Board of Trade Journal

Volume 198, No. 3823 Published by Her Majesty's Stationery Office 24 June 1970

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Front cover photograph

Since 1962, when Acmeflooring Ltd., of Huntingdon, laid the world's first anti-skid road surface on London's Tower Bridge, over 100 million tons of traffic have passed over the bridge without a single accident. Now Acmeflooring, sponsors of a national factory safety competition, have started a big export campaign, spearheaded by a brochure carrying the picture shown on this week's cover. Acmeflooring are sending the brochure to all overseas markets. Arrangements have recently been finalized in the United States and panels of anti-skid surface are already being produced for the United States. Manufacturing agreements are already at an advanced stage with many other countries, including South Africa, Australia, the Netherlands, Belgium and France.

LATE ANNOUNCEMENTS

Argentina: Tariff modifications

THE ARGENTINE Government have issued a notice relating to Decree No. 604 approving modifications in Tariff classifications, texts and import duties for certain items in Chapters 84, 85 and 90 of the Argentine Tariff.

These modifications will come into force the day following publication in the Argentine *Official Gazette*. A further announcement will be made in the *Journal* when full details become available.

Inquiries about this notice should be addressed to the Commercial Relations and Export Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2286).

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A = annually; M = monthly; Q = quarterly; 6-M = every six months

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Balance of payments:	
Civil aviation (Q)	4 Feb. 1970
Trends in invisible transactions (Q)	10 June 1970
UK balance of payments (Q)	10 June 1970
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Business names registered (A)	8 April 1970
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Industry's capital expenditure (Q)	17 June 1970
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Chemicals industry (Q)	6 May 1970
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Value of overseas trade: analysis of trends (Q)	6 May 1970
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Machine tools deliveries and orders (M)	3 June 1970
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Analysis of production (A)	11 Feb. 1970
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Industry's stocks (Q)	17 June 1970
Manufacturing industry. Census of production (A)	31 Dec. 1969
Retail (M)	17 June 1970
Television:	
Overseas payments and earnings (A)	5 Nov. 1969
Textiles:	
Clothing and textile orders and deliveries (M)	This week
Cotton production (M)	This week
Hosiery production (M)	This week
Wholesale houses sales (M)	17 June 1970
Wool exports (Q)	27 May 1970
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International tourism (A)	27 Aug. 1969
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Wholesale prices:	
Average prices of selected commodities (A)	25 Feb. 1970
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Board of Trade Departments, etc

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Board of Trade addresses	27 May 1970
Board of Trade Regional Organization	This week
British Commercial representives overseas	22 April 1970
Customs notices of interest to exporters	20 May 1970
Directory of Board of Trade departments and their work	8 April 1970
ECGD local offices	25 Feb. 1970
Half-yearly index – July-Dec. 1969	18 Feb. 1970
Official Receivers' offices	20 May 1970
Programme of trade promotions	11 Mar. 1970

SUBSCRIPTIONS

ADVERTISEMENTS

REPRINTS

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The views expressed in contributions to the Journal emanating from other than official sources are not necessarily those of Her Majesty's Government.

Advertisements. Inquiries concerning the insertion of advertisements should be addressed to Her Majesty's Stationery Office, Room D94, Atlantic House, Holborn Viaduct, London, E.C.1. (Tel. 01-248 9876, Ext. 6147.)

The Government will accept no responsibility for any of the statements in the advertisements and the inclusion of any particular advertisement is no guarantee that the goods or the service advertised herein have official approval.

Reprints of articles. Reprints from the *Board of Trade Journal*, which should be ordered within one week of publication, cost £3 0s. 0d. per page (or part) for 250 copies, carriage extra. (Larger quantities, 5s. 0d. per page for each additional 125 copies.)

Orders for reprints should be addressed to the Director of Publications (P.1), Her Majesty's Stationery Office, Atlantic House, Holborn Viaduct, London, E.C.1.

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'Chile since the Royal visit'

By J. B. Ure, First Secretary (Commercial), British Embassy, Santiago

IT IS NOW 18 months since I last wrote for the *Board of Trade Journal* about the market in Chile. On that occasion it was on the eve of the Queen's state visit to Chile, and I pointed out that the visit would create an atmosphere which would be favourable to following up commercial opportunities as they arose in Chile.

Recent achievements

In the months following the visit, British industry managed to secure more large orders from the Chilean market than at any previous time in the history of Anglo-Chilean trade relations. The most notable successes included the sale by Fairey Engineering of a nuclear reactor to the Chilean Nuclear Energy Commission, the sale by Head Wrightson of some £10 million worth of mining machinery to the Chilean state mining organization, the sale by Hawker Siddeley of a further squadron of Hunter jet aircraft, the winning of an order by Scotts for two Oberon-class submarines, by Yarrows of an order for two naval frigates, and by BP of a sizeable order for crude oil.

While these new orders have been coming in, we have also managed to maintain our predominance in the market for tractors, and a wide variety of industrial goods. At the same time we have provided financial support for an impending £5 million sale of steel-mill machinery at Concepción, and for some £8 million of pulp-mill machinery at Arauco. The 17½ per cent increase in British exports to Chile in 1969 was one of the largest increases anywhere in Latin America, and this year's figures (which should include some of the orders enumerated above) are likely to be considerably more impressive.

I am confident we shall see by the end of 1970 that British exports to Chile have been doubled (from £10 million to £20 million) in the past three years, and when the deliveries of more long-term goods begin to show up in the trade figures, we may well find they have trebled their earlier level. There can be no doubt that British industry took up the challenge offered by the exceptionally favourable climate of opinion in this country following the Queen's tour.

Local developments

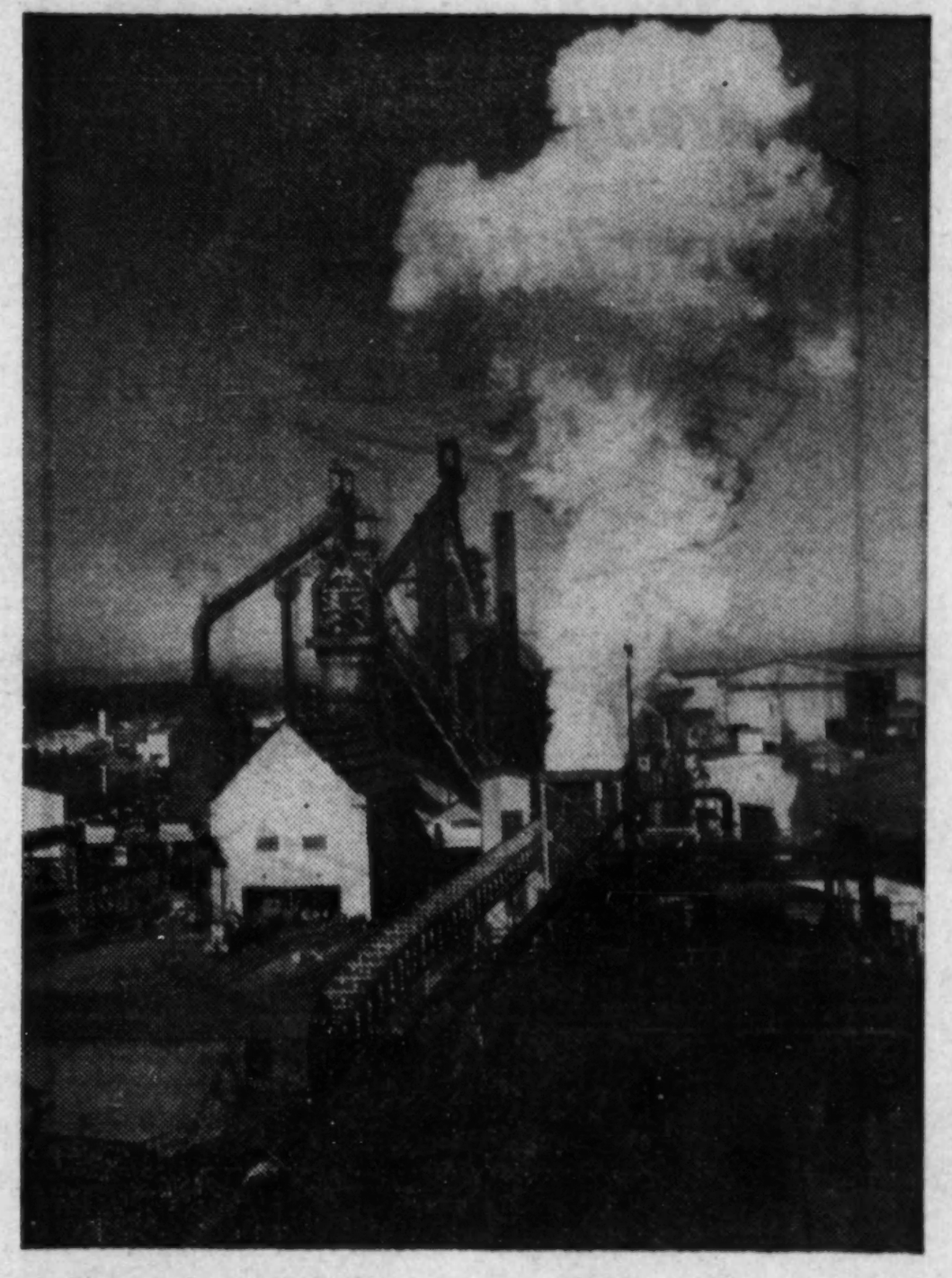
Apart from these heartening developments in Anglo-Chilean trade, the last 18 months have also produced a number of significant developments inside Chile.

Inflation has been a problem here for many years past, and the progress in restraining this which was made in the early years of the present government has proved impossible to sustain. In 1969 the rise in the cost of living in Chile was recognized by the government to be just on 30 per cent. At the end of the year large pay increases were also granted to the Armed Forces, and this in turn has accelerated the general inflationary trend. In these circumstances, business planning has to take into account the heavy cost of financing debtors. This has meant that the difficulties in the distributive trades to which I referred 18 months ago have become even more acute.

Another new factor is the impending Presidential election in September this year. There are three candidates: Jorge Alessandri, who has the support of the Right and possibly many others who recall with satisfaction his previous term in office; Radomiro Tomic, the Christian Democrat (government party) candidate who hopes for the support of a wide sector of the Centre; and lastly Salvador Allende, the candidate of the extreme Left, who has the support of the Chilean Communist Party among others. At this distance from the election it is as impossible, as it would be improper, to forecast a result.

What can be said, however, is that whichever candidate is elected British business can have confidence that Chile will continue to repay the trading credits that have been granted to her, and that there will be a hopeful future for the further expansion of Anglo-Chilean trade. In fact, Chile's foreign exchange position is the strongest it has been for many years, largely due to the sustained high price of copper.

Some speculation about the security of foreign investment in Chile followed the 'Chileanization' of the American (Anaconda) copper mining interests here a year ago. In one respect, however, this action may open a new market to us, since previously Anaconda were buying virtually all their huge annual requirement of machinery and equipment in the United States and – given energetic selling – there is no reason why a substantial portion of this market should not now be open to the United Kingdom.



The Huachipato steel works, near Concepción, of the Compañía de Acero del Pacífico. British equipment to a value of £5 million is being supplied for the extension to the works.

An encouraging development in recent months has been the abolition of the prohibition on importing into Chile many categories of consumer goods. This has had no immediate effect of any significance, since tariffs have been adjusted in such a way that it is still uneconomic to import any but a very small range of consumer goods.

It is, however, a good augury of things to come, since it is undoubtedly intended to pave the way for a controlled influx of foreign consumer goods which would provide much-needed competition for protected Chilean industries and which would serve to prepare these industries for the coming into effect of the Andean free-trade area.

Details of all the revised import regulations and duties have been forwarded by my department to the Export Services Branch of the Board of Trade in London, who can supply British exporters with complete and up-to-date details.

(*Continued on next page*)

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3

CHILE SINCE THE ROYAL VISIT, *continued*

The Chilean initiative regarding the Andean market may be regarded as a hopeful sign by all, who look forward to the benefits of selling to a larger volume of consumers. In particular, British investors in manufacturing here are well advised to do some research into the development plans for the area as a whole.

New schemes

Against this background of developments the Chilean government is embarked upon a programme of massive expansion, involving far-reaching schemes which will survive any governmental changes.

The most dramatic of these schemes is, perhaps, the Santiago underground railway project which is still at the drawing board stage. This will go far towards easing the acute traffic congestion in a capital city, which now has a population in excess of three million. The government is expected to put out some 200 calls for international tenders (40 of them large ones) in the course of this summer and it is hoped that Britain will secure a share in this.

Other major projects include a chain of new petrochemical plants and a possible nuclear power station at Antofagasta in the northern desert.

Meanwhile, the building and construction industries have emerged from a depressed period as is witnessed by the crop of new skyscrapers on the Santiago skyline.

Taxation and credit

Income from copper (for which Britain is Chile's largest customer) accounts for the bulk of the foreign currency revenue necessary for the imported content of this development programme. Local expenses are financed by high taxation, payable by both residents and foreigners in this country. For instance, a branch of a foreign company which operates in Chile pays a basic 17 per cent profits tax plus an additional tax of 37½ per cent. Dividends to non-resident (after local company profits tax) and other payments remitted abroad – e.g. for royalties, interest, etc. – are also subject to the additional tax of 37½ per cent.

Despite these apparently crippling figures many British-owned companies are running profitable operations here, notable among them being Unilever, ICI, British Ropes, Coats Patons and Duncan Fox. Anyone contemplating commencing or expanding operations here, however, would be well advised to seek local tax advice from one of the firms of international accountants here, such as Price Waterhouse Peat & Co.

When I wrote about Chile 18 months ago I stressed the importance of credit in this market. This is as true now as it was then. British business has been greatly facilitated by the existence of a government supported credit line (signed during the Queen's visit) from a consortium of British bankers – Barings, Rothschilds and BOLSA – to the Chilean Development Corporation (CORFO). The £4 million provided under this facility has already been fully taken up and it is hoped that it may be possible to negotiate a successor credit line.

A number of banks are also studying the possibility of providing shorter-term credit, explicity for smaller projects in the private sector. British exporters are well advised to talk to their banking advisors and to the Export Credits Guarantee Department in London at an early stage in their selling negotiations.

The future

A few months before an election the future is always bound to look a little uncertain in any country. But, as far as the British businessman is concerned, more things are likely to remain constant than to change in Chile. After several years of drought and some uncertainty about the effects of the Agrarian Reform programme, the agricultural production of the country is now picking up and the market for agricultural machinery may be expected to respond.

Industrial production which had also been flagging, is now once again expanding and the far-reaching schemes which the present government has initiated seem likely to be pursued by any successor; this should ensure a continuity of those large public sector tenders with which Britain has had some notable successes already.

The 'ground rules' for doing business with Chile are also unlikely to change under a new Government. Most businessmen who have any experience of this part of the world are already familiar with these, but in case there are any readers of this article to whom this is a new field it is perhaps worth mentioning a few of them:

The Chilean buyer, whether in the public or the private sector, responds to personal contact.

It is a help if the visitor speaks Spanish, but very many senior Chileans speak admirable English, and more important than a language qualification is the fact that the visitor should be a man of authority in his own organization, knowledgeable on his subject and competent to take decisions.

Chileans realize that the air fare from Britain is expensive and do not expect their visitor to come exclusively to Chile; but they do tend to react badly to being treated as an overnight halt on a whistle-stop tour of Latin America.

The British Embassy is here to help British business visitors (as is shown by the fact that the Commercial Department is much the largest part of the Embassy), but it can do so most effectively only if British firms let us know of their interests and impending visits. Although we do everything possible to help the visitor, who turns up in the office with no prior notice and says he is leaving the same night, his visit is seldom as successful as that of the man who lets us know in advance.

It is equally true that prior contact with the Board of Trade in the United Kingdom and with the Latin American Committee of BNEC (6-14 Dean Farrar Street, London, S.W.1 (Tel. 01-930 3121), can save the visitor from many pit-falls. They will be delighted to offer copies of their respective publications on this market, which will tell businessmen much more than I can put into one brief article.

The EFTA (Origin of Goods) (Amendment) Regulations 1970

THE EFTA (Origin of Goods) (Amendment) Regulations 1970 (SI 1970 No. 815) published on May 29, 1970, further amend the EFTA (Origin of Goods) Regulations 1964 (SI 1964 No. 1966).

The amending Regulations add a new entry to Schedule I of the 1964 Regulations which enables certain forms of polyvinyl acetate (ex tariff heading 39.02) to qualify for EFTA tariff treatment when made in the area from non-EFTA monomer vinyl acetate. They also consolidate all previous amendments to the 1964 Regulations.

Copies of the new Regulations are available from HMSO, 49 High Holborn, London, W.C.1, and branches, price 1s. (by post, price 1s. 4d., from HMSO, PO Box 569, London, S.E.1.).

Mr. J. R. Millbourn appointed to Export Guarantees Advisory Council

THE EXPORT Credits Guarantee Department announces that the President of the Board of Trade has appointed Mr. J. R. Millbourn to the Export Guarantees Advisory Council, which advises the Department on its 'commercial' operations.

Mr. Millbourn is chairman of Tozer Kemsley and Millbourn (Holdings) Ltd., the confirming house group, and a director of Thomas Tilling Ltd. and Cornhill Insurance Co. Ltd.

Mr. Michael Noble is BOT President in new Cabinet

MR. MICHAEL NOBLE has been appointed President of the Board of Trade in the new Cabinet announced by Mr. Edward Heath, the new Prime Minister on June 20.

Mr. Noble is a former Secretary of State for Scotland.

Further details will be published next week.

Commercial Diplomatic Officers visiting John Mowlem and Co. Ltd. The visit was a one-day session organized by the Export Group for the Constructional Industries.

ECGD backing for export contracts

Steel plant for Brazil

THE EXPORT CREDITS Guarantee Department signed a Financial Guarantee on June 12, covering the financing of a contract for the procurement, supply of equipment and materials, and associated services for the construction of an integrated steel plant to be erected at Porto Alegre, Brazil.

The contract, valued at over £9 million, is between G. K. N. Contractors Ltd., of Redditch and Acros Finos Piratini SA of Porto Alegre; a company formed to develop the steel industry in the State of Rio Grande do Sul. It was won in the face of severe competition from overseas. The plant is expected to be commissioned in the late summer of 1973.

A loan, of approximately £7 million, is being made available by the Bank of London and South America, acting on behalf of a consortium of British banks comprising themselves, Bank of Scotland, Barclays Bank Ltd., Clydesdale Bank Ltd., Coutts & Co., Glyn Mills & Co., Lloyds Bank Ltd., Midland Bank Ltd., National Westminster Bank Ltd. and the Royal Bank of Scotland, and is repayable over a period of 10 years from date of commissioning.

ECGD lines of credit

THE table below gives Lines of Credit guaranteed by ECGD under which there is capacity for further export business to be financed out of the credit. The date given is generally that of the first public announcement; working details are often finalized some time later.

Recipient	United Kingdom Bank	Date announced	Purpose	Loan Value (£ million)	Remarks
Chile	Baring Bros.	November 20, 1968	Industrial goods	4·0	Expiry date October 30, 1970
Central America	BOLSA	April 23, 1969	Capital goods	3·0	Expiry date April 23, 1971
Denmark	Lazards	March 23, 1970	Equipment for shipyards	2·5	Expiry date June 30, 1971
Iran	Midland and Morgan Grenfell	June 4, 1970	Capital and quasi-capital goods	25	Expiry date October 21, 1971
Israel	Warburgs	March 28, 1968	Capital plant and machinery	5	Expiry date August, 31, 1970
Mexico	Barings	October 9, 1969	Petrochemical	2	Expiry date September 30, 1971
Morocco	Warburgs	March 2, 1970	Plant and equipment for phosphate mining	2	Expiry date August 15, 1971
Poland	Lloyds	August 28, 1968	Capital and quasi-capital goods	20	Expiry date December 31, 1970
The following lines of credit have been virtually filled:					
Brazil	Rothchilds	February 19, 1968	Marine equipment	15·9	
Spain	Hill Samuel	April 1, 1969	Mining and other machinery	2·5	

Requests for further information on any of these lines of credit should be made to the bank concerned or to Mr. K. Lockwood, Export Credits Guarantee Department, PO Box 272 Aldermanbury House, Aldermanbury, London, E.C.2 (Tel. 01-606 6699, Ext. 615).

More effective backing for exporters: the role of the overseas commercial officer

THE EFFORTS now being undertaken to provide British exporters with a more effective official export promotion service are described in a circular letter from the then Secretary of State for Foreign and Commonwealth Affairs and the then President of the Board of Trade to all Heads of United Kingdom Missions overseas.

These changes in Britain's export promotion services have been introduced in the light of the Report of the Review Committee on Overseas Representations (1968-69) under Sir Val Duncan and the internal review of the Board of Trade Overseas Divisions carried out in 1969 by Sir Hector McNeil, Professor Elliott Jacques and Mr. W. Nicoll.

The letter is signed by Mr. Michael Stewart and Mr. Roy Mason.

It says the organizational changes being made are mainly on the home front, and are principally designed to make the service more effective. The aim is to concentrate on the areas likely to be most rewarding in terms of exports.

'We believe that one of the main gaps in our armoury has been insufficient information on the requirements, capacity and interest of exporters and potential exporters and we want to do all we can to close this. At the same time, British industry is making increasing demands on our services. How we meet industry's demands will come under scrutiny from an increasingly wide range of businessmen, particularly those who subscribe to the computer service. The changes in our arrangements are designed to enable the Government export services to face the scrutiny with confidence.'

The letter goes on to say that the Government's Commercial work is concerned with providing firms with sound political, economic and commercial information, giving direct support to exporters who go abroad on selling missions and the servicing of promotions of various kinds. The changes in the Board of Trade organization at home have improved the machinery for communication with posts and with British manufacturers. Since the transfer of industrial location work to the Ministry of Technology, the nine Board of Trade Regional offices are now almost exclusively devoted to export work, and will give personal attention to the solution of exporters' problems on the basis of client responsibility. 'The introduction of the computer service for disseminating market intelligence will help greatly towards a better understanding of exporters' plans and needs, because each firm using the service will have told us the kind of goods and the markets about which it needs information.

'We do not intend to restrict the categories of firms with which we should aim to develop closer consultation by applying criteria of size or previous success in export markets. The Board of Trade will seek to develop a closer relationship with any firm which has the will and capacity to export and which is willing to make proper use of our services. We hope that industry will come to regard the Government export services increasingly as an extension of their own marketing organizations and to recognize that the services we provide can be important in different ways to large as well as to small firms, to experienced as well as to new exporters.'

A review of future policy for trade fairs, missions and other collective promotional activities is being undertaken. 'Another task will be to explore with the help of posts the efficiency of our exporters' overseas distributive systems. It has been suggested that perhaps up to 20 per cent of existing agents and distributors for United Kingdom firms are nearly useless. If this situation could be corrected a substantial increase in exports would result.'

There will be a more systematic study of the relative importance and potential of markets throughout the world and efforts made to stimulate greater interest in those markets which will provide the biggest rewards. 'The corollary of all this is that we need to maintain the drive for greater selectivity,' says the letter. 'Officials will have in mind the need to make sure that as far as practicable assistance goes to those who can show that they are reasonably likely to be able to use it effectively to increase exports.'

The letter concludes: 'Some public comment on the Duncan Report has suggested that we are tending to turn the Diplomatic Service into an army of salesmen. This reflects a misconception of the nature of commercial work in the service. Industry does not expect posts to act as salesmen or to have technical experience in particular products. But they do expect a commercial outlook based on understanding of the problems and language of industry. They expect commercial officers to develop and use their knowledge of the market in a professional way. The commercial officer, like the diplomat engaged in other overseas work, must possess the basic skill of understanding and interpreting conditions in the overseas country and of being able to do business with its people; as has been stated in Parliament, this involves an understanding of the country in its political and economic aspects as well as in its strictly commercial aspects. It is for the businessman to sell his goods; your role is to alert him to the opportunities which he may be able to follow up, and to provide him with the background advice and support which will help him to do so.

'Some comment has suggest that the recent improvement in our balance of payments removes the need for a sustained official effort in the promotion of exports. We do not take this view; in the next few years official support for export promotion will continue to be of the utmost importance.'

The Board of Trade's new Computerized Export Intelligence service mentioned in this letter started on June 2. The service supplies exporters precisely and rapidly with exactly the kind of information they need in terms of the goods or services they export, the markets on which they seek information and the type of information they have requested. About 180 items of export information a day were issued in the *Export Service Bulletin* which the new service replaces, and it is expected that this figure will increase substantially as the new procedure gets under way. Below is a selection of export notices sent out to subscribers on one day last week. (The names of the inquirers are available to subscribers).

SPECIFIC EXPORT OPPORTUNITY

UNITED STATES: Chemicals 15265/70.

An old-established importer/ distributor seeks sources of supply from British manufacturers of the following chemicals:

(a) Potassium permanganate 8,000/10,000 tons per month
(b) Chromic acid
(c) Potassium cyanide
(d) Sodium bichromate
(e) Antimony trioxide
(f) Chrome allum
(g) Industrial inorganics

AGENCY INQUIRY

FEDERAL REPUBLIC OF GERMANY: Clothing 15180/70.

A commission agent selling clothing to the specialist retail trade in Bavaria wishes to receive offers of agencies for the following items:

(a) Men's medium quality casual outerwear and knitwear;
(b) Women's medium to better quality coats.

Manufacturers are requested to forward samples or illustrations, prices on a c.i.f. German border basis in Deutsch marks.

CALL FOR TENDERS

INDIA: Telecommunications equipment 59546/70.

The supply and commissioning of power line carrier communication, telemetering, teleprinting and teleprotection equipments for certain stations and establishment of express communication, as specifications and drawings. It is expected that the foreign exchange portion of this equipment is to be included in a World Bank Loan (IBRD).

The successful tenderer will be expected to furnish a security deposit of 10 per cent of the tender value.

Information on overseas buyers visiting Britain, manufacture under licence, successful bidders, aid and loan agreements, and similar export intelligence is also available. In addition, subscribers receive free quarterly and economic trading reports on more than 100 countries.

To take advantage of this individual service to exporters, firms who have not yet become subscribers should contact Export Intelligence, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 7049). The initial cost is £25, for which subscribers receive up to 500 notices on the countries and types of intelligence for which they have registered.

Visits by British overseas commercial representatives

THE FOLLOWING Commercial Diplomatic Officers are expected to be in this country shortly, when they will be available for discussion.

		Available	In present post since
AUSTRIA (Vienna)	D. J. NOBLE, Commercial Officer	September/October	March 1968
BRAZIL (Rio de Janeiro)	O. E. GODDARD, Second Secretary. (Commercial)	September/October	February 1969
GHANA (Accra)	D. H. MATHER, MBE, First Secretary (Commercial)	September	January 1969
ISRAEL (Tel Aviv)	T. BRYANT, Second Secretary (Commercial)	August/September	September 1968
MALAYSIA (Kuala Lumpur)	B. B. LOW, Second Secretary (Commercial)	September/October	April 1969
PAKISTAN (Dacca)	R. W. BAXTER, First Secretary (Commercial)	August/September	July 1969
PERSIAN GULF (Bahrain)	D. L. HARDINGE Second Secretary (Commercial)	September	March 1969
(Dubai)	G. P. LOCKTON, Second Secretary (Commercial)	September	February 1969
NIGERIA (Lagos)	A. F. COLLINGS, First Secretary (Commercial)	September/October	April 1968
SAUDI ARABIA (Jedda)	I. S. LOCKHART, MBE, Second Secretary (Commercial)	September	September 1968
SINGAPORE	G. F. FINLAYSON, Counsellor (Commercial)	September	February 1969

British firms and organizations, including those in the areas covered by the Board of Trade offices for the Eastern Region and London (E, EC, N, and WC), and the South Eastern Region and London (NW, W, SE and SW), which wish to meet any of these officers to discuss specific export problems are asked to write for an appointment to the appropriate Board of Trade Regional Export Director stating the nature of the problem and the commodities involved. (The Board's Regional Offices together with the areas covered and the appropriate office for Northern Ireland are given below.) Those firms and organizations other than in the London-based Regions mentioned above, which would either prefer or would be prepared, if necessary, to meet the officer for an interview in London should write to Tours Section, Board of Trade, Room 469, 1 Victoria Street, London, S.W.1.

Because some officers have only limited time at their disposal it may not always be possible to arrange an interview. Where it is not possible, firms are reminded that the Export Services Division of the Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, who are in close touch with all overseas representatives can very often supply advice, or the information that applicants hoped to obtain at the interview. Outside London the Regional Offices of the Board of Trade or, in Northern Ireland, the Ministry of Commerce, Belfast, can also supply this help.

Board of Trade Regional Organization

For information and guidance on export matters you are invited to get in touch in the first instance with the Regional Office covering your area. The names of Export Directors, and the addresses, subscriber trunk dialling codes and telex number of the Regional Offices of the Department, and of the Ministry of Commerce (Northern Ireland), are given below.

Northern Region
Cumberland, Durham, Northumberland, Westmorland and the North Riding of Yorkshire.
D. P. Dick Wellbar House, Gallowgate, Newcastle-upon-Tyne. NE1 4TJ (Tel. Newcastle 27575. TELEX 53178).

Yorkshire and Humberside Region
The East and West Ridings of Yorkshire, the City of York; Lincolnshire. (Parts of Lindsey only.)
M. Barrett (acting), City House, New Station Street, Leeds, LS1 4JQ (Tel. Leeds 38232. TELEX 55472).

North Western Region
Cheshire, the High Peak District of Derbyshire (viz., the borough of Buxton and Glossop; the urban districts of New Mills and Whaley Bridge; the rural district of Chapel-en-le-Frith), Lancashire.
N. S. Belam, Sunley Building, Piccadilly Plaza, Manchester, M1 4AT (Tel. 061 236-2171. TELEX 66104).

Midland Region
Derbyshire, except the High Peak District (see under North Western Region), Herefordshire, Leicestershire, Parts of Lincolnshire (Holland and Kesteven and the County Borough of Lincoln, Northamptonshire, Nottinghamshire, Rutland, Shropshire, Staffordshire, Warwickshire and Worcestershire).
J. F. J. Jardine, Five Ways House, Islington Row, Birmingham 15 (Tel. 021-643 8221. TELEX 337021).

Eastern Region and London (E, EC, N, WC postal districts)
Bedfordshire, Berkshire, Buckinghamshire, Cambridgeshire and the Isle of Ely, Essex, Hertfordshire, Huntingdon and Peterborough, Norfolk, Oxfordshire and Suffolk.
L. C. W. Figg, Cromwell House, Dean Stanley Street, London, S,W.1 (Tel. 01-828 6271, TELEX 25991).

South Eastern Region and London (NW, W, SE and SW postal districts)
Dorset (Poole MB only), Hampshire (including the Isle of Wight), Kent, Middlesex, Surrey and Sussex.
C. G. Cruickshank, Cromwell House, Dean Stanley Street, London, S,W.1 (Tel. 01-828 4355. TELEX 25991),

South Western Region
Cornwall (including the Isles of Scilly), Devon, Dorset (excluding Poole MB), Gloucestershire, Somerset and Wiltshire,
L. Eggleton, MBE, The Pithay, Bristol BS1 2NE.
(Tel. Bristol 21071. TELEX 44214).

Wales
The whole of Wales and Monmouthshire.
G. T. Plant, Government Buildings, Gabalfa, Cardiff, CF4 4YL.
(Tel. Cardiff 62151, TELEX 49267).

Scotland
The whole of Scotland.
V. F. Kimber, 314 St. Vincent Street, Glasgow, C3.
(Tel. 041-248 2855. TELEX 77583).
District Office: 29a High Street, Inverness.
(Tel. Inverness 30867).

Northern Ireland
Ministry of Commerce (Northern Ireland), 21 Linenhall Street, Belfast. BT2 8BY (Tel. 34488, TELEX 74578).

'Talk-in' on trading with Japan

BNEC ASIA, who with the Board of Trade organized last year's successful British Week in Tokyo, arranged to stage a 'Talk-in' on trading with Japan at the end of this month. However, the applications have been so great from industry that they have now decided to hold seven sessions. Three will be held in London and four in the provinces – in Birmingham, Glasgow, Manchester and Bristol.

The first 'Talk-in' will be held at the British Institute of Management on June 29 when the panel of experts leading the informal discussion will include Mr. Ben Thorne, director of the British Week in Tokyo.

The other six 'Talks-in' will be held in the early autumn.

Businessmen wishing to take part in the 'Talk-in' sessions, which are held in an informal manner to create as much open discussion as possible, should contact BNEC Asia at 6-14 Dean Farrar Street, London, S.W.1, as soon as possible.

Seminar for Japanese Chamber of Commerce in London

The comprehensive international service which British management consultants can offer to businessmen the world over was the message of a conference and reception held in London last week for members of the Japanese Chamber of Commerce in London.

The conference, organized by the P-E Consulting Group, was attended by senior representatives of the major Japanese trading houses with offices in London, as well as by British businessmen with Far Eastern interests and by distinguished representatives of the City of London.

The conference theme – the furthering of international commerce – was developed through sessions on trade with the developing countries, the world-wide marketing of engineering products, the improvement by national companies of their service to foreign buyers, long-range planning for multi-national companies, and the design of effective management information systems for major international groups.

Applications for temporary exemption from import duty

THE BOARD OF TRADE are considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, of will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Board of Trade, Brunswick House, 2 Central Buildings, Matthew Parker Street, London, S.W.1, preferably through a Trade Association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by July 8.

Tariff Hearing	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
29.02	1, 1, 2-Trichloroethane of which not less than 92% by volume distils between 110° and 115° centigrade at normal pressure	1, 1, 2 Trichloroethane	December 31, 1970	13057
29.35	1-(2-Morpholinoethyl-5-nitroimidazole	N-B-ethyl-morpholine-(5)-nitro-imidazole	December 31, 1970	13454
59.03	Bonded fibre fabrics containing not less than 95% by weight, calculated on the dry material, of synthetic polyamide (fibres and fibrid bonding) materials which do not melt below 300° centigrade	Polyamide fibre paper	December 31, 1970	9504

NOTE: Amendment of Definition

Interested parties may wish to know that an application has been received to amend the temporary exemption definition of Sodium 2-benzylsulphanilate which was advertised in the *Board of Trade Journal* dated June 10, 1970, to the following:

29.22 Sodium *N*-benzylsulphanilate

Metrication conversion tables

THE METRICATION BOARD have announced that a number of traders have sought guidance from them about the availability of suitable conversion tables and the extent to which such tables can properly be used to enable trade to be conducted in metric units before all weighing and measuring equipment has been converted, and conversely to permit remaining trade in imperial units after the conversion of equipment to metric.

Many traders will need to use conversion tables, despite their practical disadvantages, at least during a transitional period which it is in everyone's interest to keep as short as practical considerations allow.

A number of conversion tables have already been published commercially and others are in preparation. All tables should be based on the statutory definitions in the Weights and Measures Act, 1963. Many of the conversion tables currently available are based on the accepted arithmetical rules of 'rounding' up or down and will therefore not be suitable for trading purposes because Section 24 of the Weights and Measures Act 1963 makes it an offence to give short weight or measure (or to overcharge for the goods supplied if they are supplied at a stated price per unit weight of measure). Traders must therefore choose tables which have been prepared on the basis of 'rounding down'. Different tables must be used for converting from imperial to metric and vice versa: the correct tables should always be chosen so that 'rounding' is in the customers favour.

Different trades will require tables giving different degrees of precision. Likewise the range of the tables and the number of steps in the range will vary between one application and another. It is, of course, desirable that similar tables are used in similar trades and individual traders should consult with their trade associations or comparable representative body about the availability of conversion tables suitable for their particular sector.

Publishers or organizations who wish to prepare tables can use the statutory definitions of the various units or refer to one of the conversion tables already available, such as the tables in BS 350 Part 2 (published by the British Standards Institution†), as the basis for the preparation of conversion tables designed to meet the needs of particular industries and trades. Individual companies or trade associations may wish to publish their own tables. The National Physical Laboratory is able to offer advice on conversion factors and the National Computing Centre is willing, for a suitable fee, to prepare tables.

Inquiries about the basis on which tables should be prepared to meet the requirements of the Weights and Measures Act should be addressed to The Board of Trade, Standard Weights and Measures Department, 26 Chapter Street, London, S.W.1 (Tel. 01-834 7032), or to any local Chief Inspector of Weights and Measures.

Inquiries about the preparation of tables should be addressed to The Technical Division, Metrication Board, 22 Kingsway, London, W.C.2 (Tel. 01-242 6828, Ext. 221).

The Director (Attention Mrs. P. Anderton), National Physical Laboratory, Queen's Road, Teddington, Middlesex (Tel. 01-977 3222, Ext. 191).

The National Computing Centre, Quay House, Quay Street, Manchester (Tel. 061 832 9731).

The Metrication Board will answer any general inquiries about tables.

† The British Standards Institution, Publications Sales Office, 101/113 Pentonville Road, London, N.1 (Tel. 01-837 8801). Price 25s. Postage extra.

Management education in the 1970s

WHAT IS CLAIMED to be the most thorough survey into the management education field in this country was published on June 23 in a report by the National Economic Development Office (HMSO, £1). The report, *Management education in the* 1970*s – growth and issues*, prepared by Professor Harold Rose of the London Business School, contains the results of a research project commissioned on behalf of the National Economic Development Council's Management Education, Training and Development Committee and the Council of Industry for Management Education and an extensive pilot investigation of the demand for and supply of management education in the 1970s. It is based on replies to a series of postal questionnaires sent to companies and financial institutions. Information was also obtained from the nationalized industries, industrial training boards, the Civil Services, the TUC, university business schools, colleges of further education and other educational centres, as well as from a number of other organizations and individuals.

The report, although a preliminary study, is seen as a major contribution to our knowledge and understanding of what is currently taking place in the management education field in this

country and the direction in which future expansion is likely to go.

The volume of management educaton has increased rapidly over recent years. Not only do more industrial companies have managment development schemes and more managers attend courses, but interest has already become widespread in, for example, the banks and other financial institutions, the Civil Service, the hospital services and in local government. Thus management education and development are now associated with most forms of organizational management and not, as in the past, almost exclusively with industry.

In 1968 post-experience courses (over one week in length and not leading to qualification) were attended by some 125,000 managers – or 8 per cent of all 'managers'. Even so, the present level of activity on all management courses, post-graduate and post-experience, is only sufficient to give all managers the equivalent of about six weeks' full-time study over a 30-year life span.

Two factors stand out as particularly significant. Firstly, the number of post-graduate students is extremely small when compared either with the total number of managers or with the total number of attendances on management courses. Post-experience courses account for some 95 per cent of all attendances. Secondly, it is clear that companies are themselves responsible for about 75 per cent of all post-experience courses of the type covered in the survey.

The managers

The report estimates the total number of managers in the United Kingdom from the census of population and directly from the survey results. According to the 1966 sample census of population there were one and a half million managers representing some 6.2 per cent of the employed population. Of these, some 393,000 were in manufacturing industry and 348,000 in wholesale and retail distribution representing some 4.7 per cent and 11.0 per cent respectively of the total numbers employed in these fields.

Figures from the census of population are broadly confirmed by the information obtained from the companies covered in Professor Rose's survey which showed that 5.3 per cent of the total number of employees were classified by their companies as managers. Professor Rose concludes that there are some one and a half million people for whom courses in management studies are relevant, and that this number is increasing. He also estimates that some 75,000 become managers each year, of whom about 50,000 are required for replacement alone and the remaining 25,000 arise from the increasing proportion of managers in the total employed population.

Management development schemes were operative in some 83 per cent of companies covered in the survey with over 20,000 employees, 55 per cent with 2,000-20,000 employees and only 19 per cent of companies with fewer than 2,000 employees. Where companies have management development schemes significantly more use is made of external management courses.

The report also examines post-experience courses, post-graduate courses, doctoral courses and the supply of competent management teachers.

Mayor of Tehran visiting Britain

DR. G. R. NIKPAY, the Mayor of Tehran, arrived in the United Kingdom on June 21 for an 11-day visit as a guest of the Board of Trade.

During his visit, Dr. Nikpay will call on the Board of Trade, the Ministry of Overseas Development and trade organizations concerned with British exports to Iran. The Mayor will also visit County Hall, London Transport, and a number of firms to discuss various aspects of municipal development.

British exports to Iran have shown a steady growth since 1966, increasing from £39 million in that year to £71 million last year. It is anticipated that the 1970 figure will reach £75 million.

Consideration of mergers by the DEP

THE DEPARTMENT of Employment and Productivity have announced that on the information at present before them it is not intended to refer the following proposed mergers to the Monopolies Commission under the provisions of the Monopolies and Mergers Act, 1965:

Proposed acquisition by Grand Metropolitan Hotels Ltd. of Berni Inns Ltd.

Proposed acquisition by Lex Service Group Ltd. of Steels Garages Ltd. and the vehicle interests of Hanson Trust Ltd.

Financial assistance for re-equipment by textile companies

THE GOVERNMENT has arranged with the Industrial Reorganization Corporation that the Corporation will consider applications for finance for re-equipment by the medium sized and smaller companies in the cotton and allied textile industry.

Finance will be available for the construction and equipment of new textile factories, or for the overall modernization of existing factories. Companies will be expected to satisfy the IRC that they have the management resources to effect significant improvements in manufacturing efficiency and productivity, complemented by a sound marketing strategy.

The terms in any particular case will be for negotiation between IRC and the company concerned, and will depend *inter alia* on commercial lending rates at the time of drawing down. The amount involved in each case will not generally be less than £100,000.

The IRC will be assisted in the administration of the scheme by the Manchester office of the Industrial and Commercial Finance Corporation. Interested companies are invited to make early application to either the Industrial Reorganization Corporation, 46 Pall Mall, London, S.W.1, or the Industrial and Commercial Finance Corporation, Virginia House, 5 Cheapside, Manchester 2.

It is envisaged that loans of up to a total of £10 million might be made available, with the actual issue of the finance being spread over two/three years. If, however, sufficient schemes are advanced meeting the standards required, the possibility of providing further finance is not ruled out.

'Difficult but challenging' year for NW Industrial Development Association

THE PAST YEAR has been a 'difficult but challenging one' for the economy of the region. Industrial growth had been comparatively modest, but the success of the Government's post devaluation strategy, and the dramatic improvement that had taken place in the balance of payments all helped to ensure a sound base for the future growth of the regional economy.

This statement was made in the annual report of the North West Industrial Development Association presented at the Association's 24th annual meeting in Blackpool on June 12.

NE Development Council's annual report

'THE NORTH-EAST'S aim is to reach the stage as quickly as possible where we can do without special help,' according to Alderman A. L. Newman, outgoing chairman of the North-East Development Council. Writing in the council's ninth annual report, Alderman Newman continues: 'I would agree with what economists tell us that by the mid-seventies we should begin to feel the benefits of the consolidation period of the sixties.'

The chairman describes a massive programme of road building, the development of five new towns and two good airports. 'All this, together with an adaptable labour force, the Government Training Centres at Killingworth, Felling, Durham, Darlington and Billingham and a large number of good industrial sites have helped the region attract over 250 new manufacturing firms in the period 1960-1969. Projects for which Industrial Development Certificates have been issued in the North-East have created an estimated 154,000 new jobs, including, 107,000 for males. These projects covered 63 million square feet of factory space.

In viewing this progress we must also recognize the assistance given to the region by Central Government. Between April 1, 1960 and March 31, 1969, the Northern Region received £83 million financial assistance under the Local Employment Acts 1960 and 1966 and about £112 million in Investment Grants. This means an estimated £180 million has been spent in the North-East alone. In addition the Regional Employment Premium, totalling about £58 million, has been paid to firms in this area since 1967,

New control and automation factory in the north east

THE MINISTRY of Technology has announced that Reyrolle Parsons Automation Ltd., are to occupy a newly completed 25,000 sq. ft. advance factory which has been built by the English Industrial Estates Corporation on the Team Valley Trading Estate, Gateshead. In advance of this move it has already been agreed to provide a 6,000 sq. ft. extension to the factory for laboratory and test facilities in addition to a further 5,200 sq. ft. of office accommodation which will be completed later this year.

When first established at Team Valley in 1963, the company was known as System Computors Ltd., and occupied a 2,000 sq. ft. factory unit housing 20 production personnel. With the completion of this transfer, which will be phased over the next few months, the company will have realized in seven years of operation, more than a tenfold increase in its work force.

Advance factory for Bodmin

THE ENGLISH INDUSTRIAL Estates Corporation has announced that work is to start immediately on the construction of a 10,000 sq. ft. advance factory for the Ministry of Technology on the Pool Industrial Estate, Carn Brea, Camborne.

A contract worth about £54,000 has been awarded to Dudley Coles Long Limited of Plymouth for the building of this unit. Architects are Geoffrey Bazeley and Associates, Quantity Surveyors Snellgrove and Partners and Heating and Lighting Consultants Hoare Lea and Partners. The factory should be ready for occupation in February 1971.

Dudley Coles Long Ltd., have already completed site development work over an area which will enable these premises to be extended to 40,000 sq. ft.

Further advance factories of 10,000 sq. ft. each have been authorized for Penryn and Bodmin and it is hoped that work will be started on these units later this year.

Industrial development in Wales

A TWENTY-FIVE THOUSAND sq. ft. advance factory at Bridgend, two new factories at Ystrad Mynach and the allocation of a 10,000 sq. ft. advance factory at Ammanford have been announced recently by the Secretary of State for Wales.

The Ministry of Technology advance factory of 25,000 sq. ft. on the Ministry's Industrial Estate at Bridgend has been allocated to Clark Equipment Ltd. of Camberley, Surrey. Clark Equipment Ltd. is the United Kingdom subsidiary of Clark Equipment Company of Buchanan, Michigan, United States, one of the largest manufacturers of earth-moving equipment in the world; in addition to its operations in the United Kingdom there are similar plants at Strasbourg in France, Mulheim in Germany, and Bruges in Belgium. The British company employs nearly 2,000 people at Camberley, Blackbushe in Hampshire, and Birmingham and manufactures a wide range of earth-moving equipment and fork lift trucks. Of a total turnover of nearly £20 million a year over 60 per cent is attributable to exports to many overseas countries. In 1966 and 1970 the company received the Queen's Award to Industry for export achievement.

The factory at Bridgend will be utilized for the production of a new type of prefabricated modular-based cargo van body designed to be mounted on a commercial chassis for which these is believed to be a high demand both in this country and overseas. At a later stage it is contemplated to undertake the manufacture of allied production lines at Bridgend.

When the factory is fully operational it is expected that about 120 people, nearly all of whom will be men, will be employed.

Wavin Pipes United Kingdom Ltd. of London and Preston will also build a factory (40,000 sq. ft.) at Ystrad Mynach. A subsidiary of Royal Dutch Shell, the Wavin group of Companies is Europe's largest producer of pvc pipes, with factories in Holland, Germany, Ireland, Denmark and India.

The factory will be erected in a site adjoining the Tudor Accessories factory at Ystrad Mynach and the site will provide ample room for expansion and the accommodation of possible future developments. Employment will be provided for 100 people, virtually all of whom would be men, in the first stage of the project and this will be increased to between 375 and 400 as development proceeds.

In Ystrad Mynach, Glamorgan, in the Special Development Area, Nova (Jersey) Knit Ltd. was founded in 1966 and employs about 170 people on the production and distribution of jersey fabric. The company has achieved rapid success in the fabric field and turnover is now close to £4 million a year, of which 20 per cent is attributable to exports. Just less than half of their production is used by manufacturers of garments for Marks and Spencer Ltd.

At Ammanford the Ministry of Technology Advance Factory of 10,000 sq. ft. has been allocated to The Ormond Engineering Co. Ltd. of Rosebery Avenue, London, E.C.1.

The Ormond Engineering Co. Ltd. is a private company, established over 50 years ago, which at present operates three factories in the London area and employs over 300 people on the production of rolled thread screws and repetition turned parts. Because of acute shortage of labour in the London area and lack of space for future expansion the company have decided to establish a unit in South Wales where there is more scope for their planned expansion. Initially the unit to be established at Ammonford will produce rolled thread screws but it is possible that at a later date the manufacture of repetition turned parts could be introduced.

When the project, for which the company will also be receiving financial assistance from the Ministry of Technology, is fully operational employment will be provided for 50 people, including 45 men. Shift working will be introduced and the company will initiate a training programme in the various skills which will be required. Further expansion is expected both of production and the labour force in due course.

LETTERS TO THE EDITOR

Editorial communications should be addressed to the Editor, Board of Trade Journal, *Room* 437, *Board of Trade*, 1 *Victoria Street*, *London, S.W.*1 (*Tel.* 01-222 7877, *Ext.* 2653/6) *and not to HMSO.*

Robert Hough

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Patents endorsed 'Licences of Right'

UNDER SECTION 35 of the Patents Act 1949, the following patents were endorsed 'Licences of Right' on the dates specified.

Number	Grantee	Subject-Matter
	May 19, 1970	
963,148	Regie Nationale des Usines Renault	Internal combustion engine valve gear arrangements
1,045,440	Kanegafuchi Boseki K K	Drying of wet fine chips or powder particles of a thermoplastic polymer
1,048,558	A B Vacuum-Exbrator	Instruments for draining cysts
1,055,811	Siemens-Schuckertwerke A G	Apparatus in which a gaseous medium can be passed through on bed of movable particles.
1,055,967	Siemens-Schuckertwerke A G	Heat exchangers
1,099,706	Gevaert Agfa N V	Silver halide emulsions and photographic materials comprising the same
1,107,022	Gevaert Agfa N V	Development of light-sensitive silver halide materials
1,119,075	Gevaert Agfa N V	Development of photographic material
1,120,963	Gevaert Agfa-N V	Silver complex diffusion transfer process
1,155,958	Gevaert Agfa N V	Light-developable photographic material and recording process
1,162,135	Gevaert Agfa N V	Light-sensitive silver halide emulsions
1,167,138	Northern Electric Company Ltd.	Method of preventing growth of metallic whiskers
	May 21, 1970	
945,076	A. Ornstin Limited	Buckles
	May 22, 1970	
786,101	Standard Telephones & Cables Ltd.	Locking devices controlled by shock
939,095	Standard Telephones & Cables Ltd.	Method of producing deposit
943,394	Wilhelm Goddert	Cuticle remover
1,070,823	Charles William Berthiez	Boring and facing machines
1,084,002	Standard Telephones & Cables Ltd.	Repeater amplifier
1,090,790	Standard Telephones & Cable: Ltd.	Waveguide junction
1,102,563	Standard Telephones & Cables Ltd.	Methods of layer formation
1,133,336	Standard Telephones & Cables Ltd.	Telephone dial mechanism
1,140,560	Standard Telephones & Cables Ltd.	Repeater amplifier
1,153,461	Douglas Hodgson	Stabilizers for vessels
1,161,483	Douglas Hodgson	Space heating systems
1,162,490	Standard Telephones & Cables Ltd.	Space heating systems
1,171,465	Standard Telephones & Cables Ltd.	Heated blankets, envelopes or casings
	May 28, 1970	
883,005	Secure Safes (Coventry) Limited	Locks and bolts
939,897	United States Atomic Energy Commission	Remotely controlled dust sampler
958,048	United States Atomic Energy Commission	Process for removal of radionuclides from milk
961,745	United States Atomic Energy Commission	Vented fuel element for gas cooled nuclear reactors
983,528	United States Atomic Energy Commission	Superconductor apparatus
989,668	United States Atomic Energy Commission	Regeneration of hydrocarbon solutions of triakyl phosphate used in proceeding of nuclear fuel
999,931	United States Atomic Energy Commission	Low temperature graphite radiation damage removal
1,000,935	United States Atomic Energy Commission	Rotary shaft construction with diaphragm type of seal
1,057,357	United States Atomic Energy Commission	Combination trap and vacuum pump
1,063,274	United States Atomic Energy Commission	Brazing alloys for tungsten molybdenum and alloys thereof
1,119,598	United States Atomic Energy Commission	Separation of uranium from noble and refractory metals
1,126,433	United States Atomic Energy Commission	Winding system for magnet excitation coils of particle accelerations
1,127,865	United States Atomic Energy Commission	Charged particle extractifg magnet for an accelerator
1,137,519	United States Atomic Energy Commission	Device for monitoring shut-down nuclear reactors
	June 3, 1970	
1,060,208	International Standard Electrical Corporation	Avalanche transistor
1,128,487	International Standard Electric Corporation	Route search arrangement for an automatic telecommunication exbange
1,128,488	International Standard Electric Corporation	Method for the route search in a centrally controlled exchange system
1,128,489	International Standard Electric Corporation	Method for route searching in telecommunication particularly telephone exchange systems
1,128,490	International Standard Electric Corporation	Storage to determine a connection route via switching network in telecommunication, particularly in the telephone exchange systems
	June 5, 1970	
824,221	Standard Telephones & Cables Ltd.	Electric pulse modulating and demodulating circuits
824,222	Standard Telephones & Cables Ltd.	Electric pulse modulating and demodulating circuits
896,501	G. Q. Parachute Co. Ltd.	Parachute packs
947,265	Standard Telephones & Cables Ltd.	Time interval measuring circuit
974,721	Standard Telephones & Cables Ltd.	Pulse code modulation coder
975,853	Standard Telephones & Cables Ltd.	Electromagnetic switch
982,224	Standard Telephones & Cables Ltd.	High voltage supply source
1,019,599	Standard Telephones & Cables Ltd.	Telephone ringer
1,021,007	Agfa A. G.	Hardening of photographic protein-containing layers
1,053,308	Standard Telephones & Cables Ltd.	Doppler radio navigation systems
1,075,385	Agfa A. G.	Productionr of colour direct-positive images
1,084,945	Standard Telephones & Cables Ltd.	Temperature compensation of crystal oscillators
1,146,644	Muanyagipari Kutate Intezet	Radiation indicators

During a visit to the Wedgwood factory at Barlaston Mr. Finn Hornsleth (left) and his son Steen (right) of Oscar Hornsleth, Copenhagen, discuss the 1970 *Wedgwood Jasper Christmas Plate with Mr. Douglas Hawley, Wedgwood divisional sales manager.*

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the Form No. 45 within two months after the date of endorsement. patents may apply for cancellation of the endorsement on Patents

The Patents Office,

E. ARMITAGE,
Comptroller.

Problems of Progress in Industry

A series of booklets whose aim is to present briefly and simply the results of new research into the social, economic and technical problems of industrial progress. Titles include: No. 9 Automation and Skill **6s. 6d.** (7*s.*), No. 10 Woman, Wife and Worker **2s.** (2*s.* 4*d.*), No. 11 Money for Effort **1s. 9d.** (2*s.* 1*d.*), No. 12 Human Sciences Aid to Industry **2s.** (2*s.* 4*d.*), No. 13 The Supervisor and His Job **3s. 6d.** (3*s.* 10*d.*), No. 14 Teaching Machines and Their Use in Industry **3s.** (3*s.* 4*d.*), No. 15 Training the Adult Worker **3s. 6d.** (3*s.* 10*d.*), No. 16 How Research Can Help Training **1s. 6d.** (1*s* 10*d.*), No. 17 Subjective Standards in Industrial Inspection **2s. 3d.** (2*s.* 7*d.*), No. 18 Work Flow in Batch Production **3s.** (3*s.* 3*d.*)

Prices in brackets include postage.

Government publications can be purchased from the Government Bookshop in London (post orders to P.O. Box 569, S.E.1), Edinburgh, Cardiff, Belfast, Manchester, Birmingham and Bristol, or through any bookseller.

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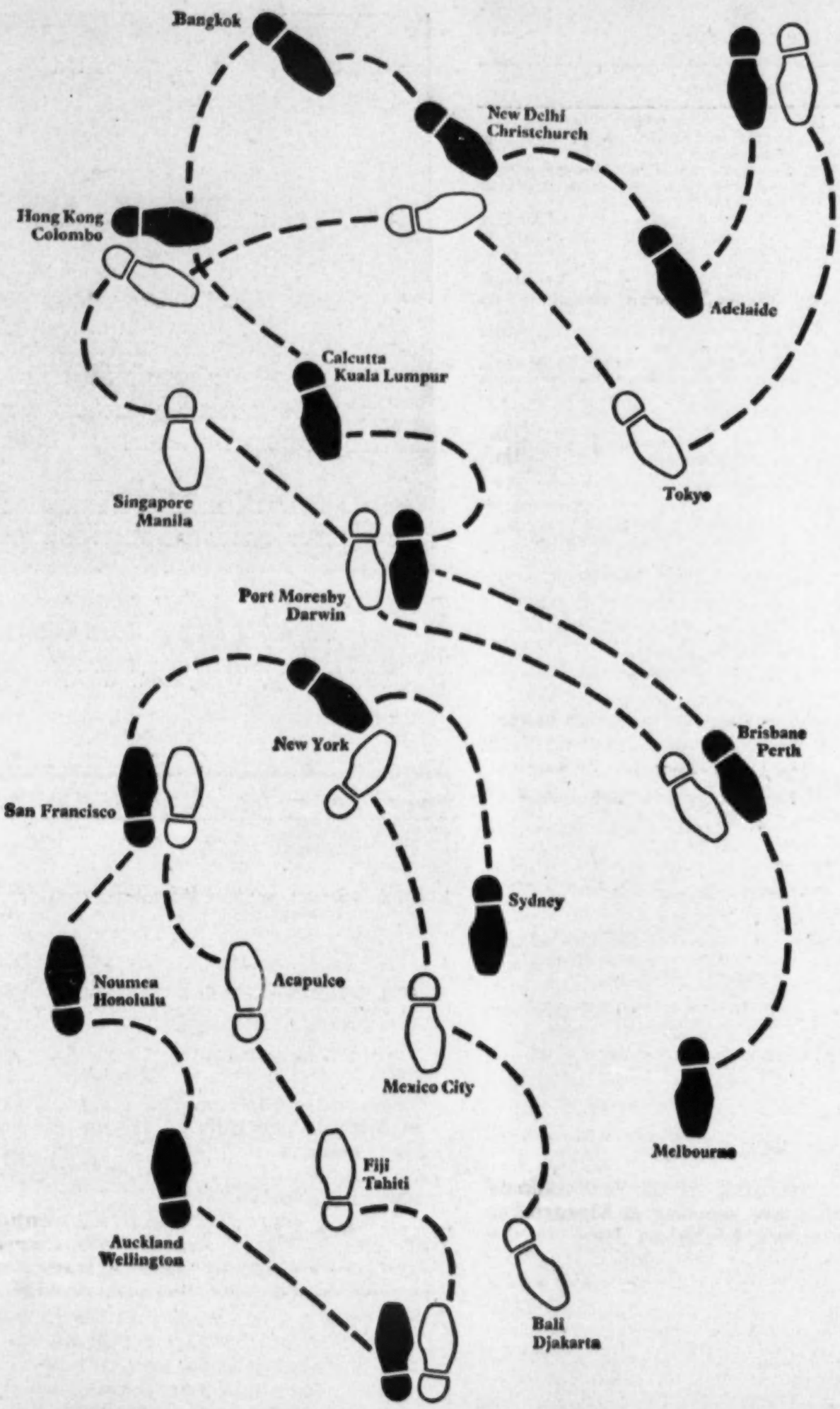

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Aviation and Shipping

UK—Soviet aeronautical collaboration

THE MINISTRY of Technology issued the following statement on June 17: 'A delegation from the Soviet Union has been visiting the United Kingdom as guests of Her Majesty's Government since June 9 to discuss various aspects of civil aviation. The delegation was led by Mr. A. A. Kobzerev, Deputy Minister for the Aircraft Industry of the USSR, and included:

Mr. M. M. Kulik, Deputy Minister for Civil Aviation of the USSR; Dr. G. P. Svischev, Head of the Central Aerohydrodynamical Institute, Moscow (TsAGI); Miss G. M. Kiseleva, Interpreter, State Committee for Science and Technology.

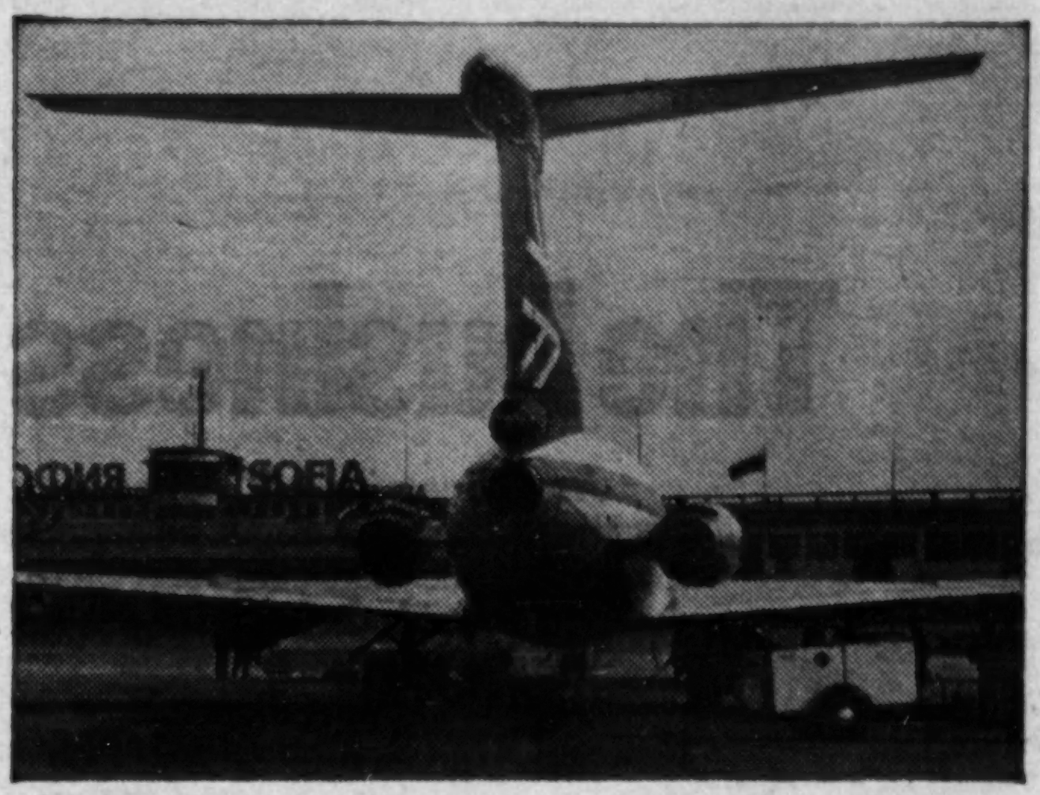
'The delegation met Lord Delacourt-Smith, Minister of State, at the Ministry of Technology.

'Discussions were held on technical matters of mutual interest in civil aviation, including noise, all weather operations and flight test methods, with representatives of the Ministry of Technology and the Board of Trade. The delegation also visited Mintech Research and Development Establishments, aerospace manufacturers and British European Airways.

'It has been agreed that discussion should continue on the topics already considered and information will be exchange on a wide range of specific points within these areas.

'The meetings have been carried out in a cordial atmosphere of mutual understanding and have allowed a useful and instructive exchange of views. Both parties believe that within the area discussed there exist opportunities for a further fruitful exchange of views on civil aeronautical problems.

'The delegation return on Thursday, June 18'.



British European Airways Trident Two 'Foxtrot Juliet' opened up BEA's newest route, the twice-a-week service to Sofia via Belgrade, on June 2. BEA hopes to expand the business, holiday and cargo market in Yugoslavia and Bulgaria, and aims to increase the frequency of flights to Belgrade and Sofia to operate at least three services a week by 1973, and four services weekly by 1975.

Conference on aviation security

THE EXTRAORDINARY session of the Assembly of the International Civil Aviation Organization (ICAO) is now meeting in Montreal to discuss aviation security. The conference began on June 16 and will continue until June 30 and the United Kingdom Delegation is led by Group Captain J. B. Veal, Director-General of Safety and Operations at the Board of Trade. At the opening Plenary Meeting, Group Captain Veal made the following statement:

'As one of the 11 States which requested the calling of this Extraordinary Session of the Assembly, the United Kingdom deplores the events which made such action necessary. Civil aviation, perhaps more than any other form of transport, depends on safety and freedom of movement, the full restoration of which must surely be our common cause. There can be no doubt that the threat to safety arising from criminal acts against aircraft presents far more intractable problems than those which have been encountered so far in the development of air transport. Nevertheless, it seems reasonable to hope, from the attendance of so many States at such relatively short notice and from the many constructive working papers submitted to the Assembly, that objective examination and rational discussion, at this time, of the problems of aircraft security will lead to agreement for action and the creation of an international environment which will not only effectively discourage all forms of violence against aircraft but will also afford a powerful deterrent to hi-jacking and mitigate its consequences.

'Governments have a duty, in the spirit of the Chicago Convention, to do what is possible, internationally and otherwise to combat unlawful interference; to stand ready to advise and assist, as well as having a general responsibility for preventing criminal action. But the problem is clearly not one which can be solved by ICAO or by Governments alone, or indeed by any single part of the aviation community. As the papers presented to the Assembly recognize, Government, ICAO, other international bodies, airlines, airport authorities, all have their contribution to make.

'In the United Kingdom view there are a number of main areas in which we should try to make progress. I do not mention them in any particular order of importance; we believe them all to be important. First there is clear scope for considering the development of a body of material on aircraft and airport security – whether as a new Annex to the Chicago Convention or otherwise – at the same time bearing in mind that it is essential to provide for flexibility in order to avoid unnecessary restriction in those areas where the risk is less.

'Secondly there is the Tokyo Convention, relating to crimes in aircraft generally It is our earnest hope that discussion of the problem here will persuade more countries to ratify this Convention which we regard as a most important link in the aircraft security chain.

'Thirdly there is the draft Convention on the unlawful seizure of aircraft. The United Kingdom considers that this draft Convention provides an effective framework for bringing hi-jackers to justice and will, thereby, provide a valuable deterrent. We regard it as most important that it should be finalized at the Diplomatic Conference which has been convened for this purpose in December this year, and shall give it our strong support.

'Fourthly, to complement the hi-jacking Convention, the United Kingdom considers there is a need for an international instrument on violence against aircraft. The United Kingdom has presented for consideration (a paper on) proposals for such an instrument which, in respect of punishment, arrest of offenders, prosecution, extradition and measures of assistance, is on similar lines to the draft hi-jacking Convention. The United Kingdom regards an international instrument on violence against aircraft as of much importance in providing a further deterrent to unlawful interference. But I wish to emphasize that we also regard it as important that consideration of such an international instrument should not prejudice progress towards acceptance of the draft hi-jacking Convention and that the two should in any case be capable of separate ratification'.

OVERSEAS COMMERCIAL POSTS

Over 200 official commercial posts in all the main centres of world trade are at the service of the United Kingdom exporter A full list of their addresses is given in the pink paper supplement of April 22 issue.

The business end of Sabena.

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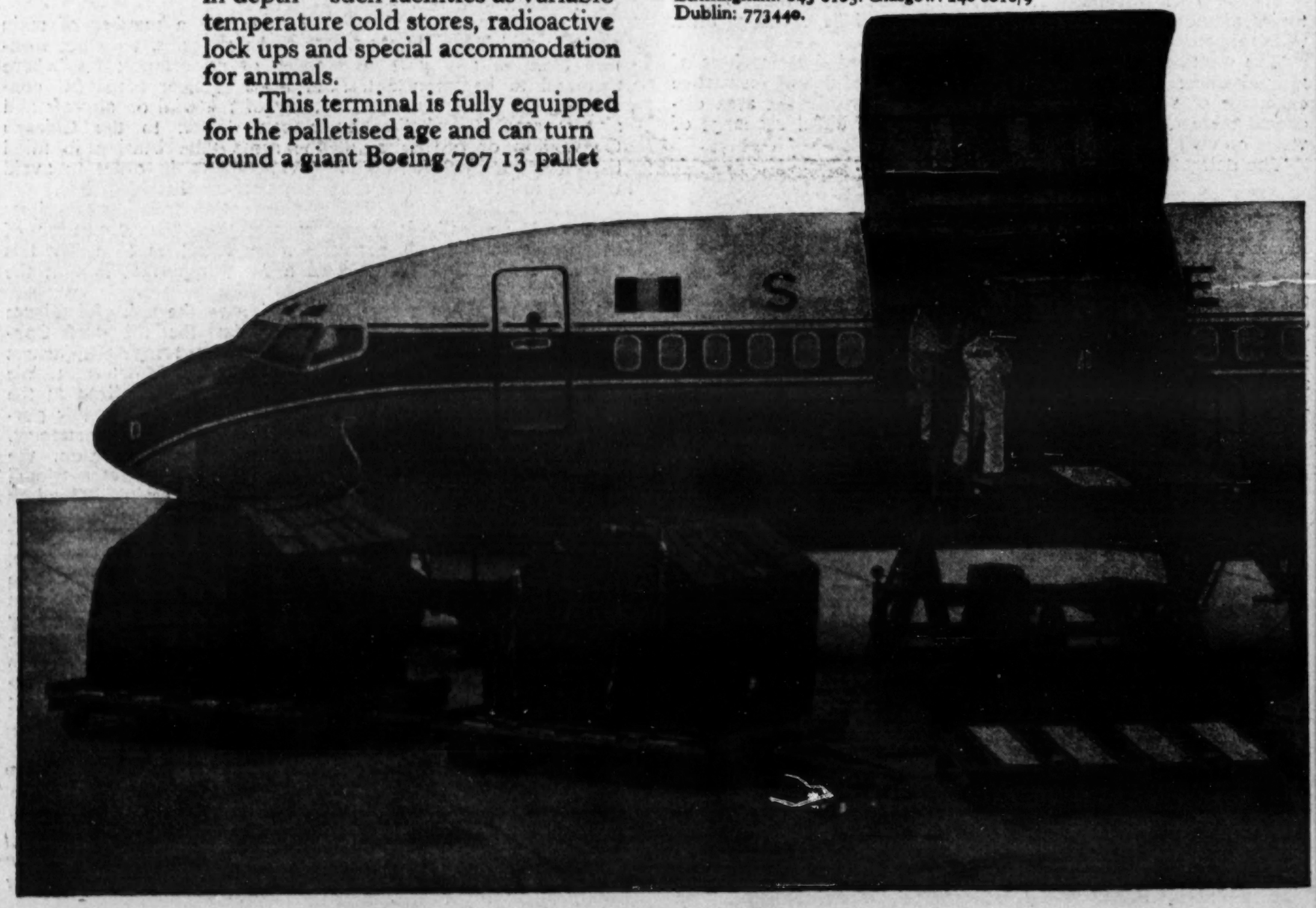

New Books

Industrial marketing in its broadest sense, means marketing to industry – as distinct from consumer marketing which is concerned with marketing every-day products to the mass of humanity. **Industrial Marketing and Advertising in Europe**, written by a team from Roles & Parker's United Kingdom and International Offices. (32 pages. Institute of Practitioners in Advertising, 44 Belgrave Square, London, SW1. 5s. (25p)) outlines the wide range of services which the British advertising agency can offer the industrial advertiser. It is divided into four main sections: finding your market in Europe, selling into your European market, advertising in Europe, and helping your advertising agency. The final section contains an analysis of the services which a United Kingdom agency can offer to a client selling in Europe, and an assessment of the costs involved. A number of useful appendices are also included.

The East African Community and Common Market, by Ingrid Doimi di Delupis. *Development Texts*. (185 pages. Longmans. 20s. (£1.00) SBN 582 64525 5). The Common Market in East Africa, organized within the framework of a new East African Community, is certainly one of the most interesting innovations of international law and economy. The East African Community – which also administers common services of a variety unparalleled in other international organizations – represents an original constellation of administrative and economic power. This book purports to analyse the functioning of the East African Community and its Common Market, and the association agreement with the European Economic Community in comparison with other agreements on association with African countries concluded by the EEC, such as the Yaoundé Convention and the Agreement with Nigeria.

Industrial Concentration, by M. A. Utton. (131 pages. Penguin Books. 7s. (35p). SBN 14 080172 3). **Trade and Specialization**, by Ronald Findlay. (140 pages. Penguin Books. 7s. (35p). SBN 14 080164 2). The *Penguin Modern Economics Texts* series, to which these two titles belong, is directed at students of economics in universities and colleges of higher education. The series has nine divisions based on major teaching areas. Of the present volumes, Professor Findlay's appears in the International Economics division edited by Professor J. Spraos, and Mr. Utton's in the Industrial Economics division edited by Professor H. Townsend. *Industrial Concentration* considers the whole range of arguments for and against high levels of industrial concentration. The factors affecting concentration levels are discussed at some length, as are the strengths and weaknesses of the data and the measures that have frequently been used in empirical studies. The core of the book is a survey of the available evidence on concentration levels and trends in Britain and the United States. The book is completed by an examination of industrial concentration in relation to market behaviour and performance, and by a consideration of the attitudes to concentration that governments may adopt in the search for better industrial performance. Readers of *Trade and Specialization* are assumed to have a good foundation in economic theory, and Professor Findlay's objective is to present, in a concise but fairly rigorous form, the foundations of that part of the theory of international trade which deals with the explanation of the pattern of international specialization and the gains from trade. The starting point is the general equilibrium model of resource allocation and production in a closed economy. Following chapters outline the logical structure of the various theories of international specialization, including the 'vent for surplus', 'availability' and 'imitation gap' theories. The empirical evidence for and against these theories is then examined. The final chapter deals with the welfare implications of trade. The emphasis in both of these volumes on empirical evidence, and the generally clear style in which they are written, should make them useful to readers who need a concise account of these important topics in economics.

Soviet Economics, by Michael Kaser. *World University Library*. (256 pages. Weidenfeld and Nicolson. £1 15s. (£1.75) SBN 303 17565 6). The USSR is second only to the USA as an industrial power; and it manages its economy without the market mechanism common to other large developed nations. How it does so is of importance not just to students of economics, but also to anyone interested in Soviet affairs. Scarcely a century ago Russia could show all the forms of ownership which Marx classified – slavery, feudalism and capitalism. The new Soviet State broke not only with the political and social framework of the past, but also with its economic practices, even to the temporary abolition of money. Many of its methods were indeed new to any State. This book, written by a Senior Lecturer in Soviet Economics at Oxford, describes how Soviet planning derives from Marx's economics, Lenin's revolutionary élite and Stalin's autocracy, and shows that the crude techniques of the first two Five-Year Plans were drafted before any Government could draw upon the sophisticated analyses of the modern economic process published in the 1930's – by Keynes in Britain, Kantorovich in the USSR and Leontief in America. The author's analysis of Soviet economics is divided into three parts which deal with its ideology, its mechanics and its objectives. The final chapter entitled the 'Optimal Plan' deals with the future of the Soviet economic system. One of the main conclusions reached by the author is that the future of the economic system of the USSR does not lie in a convergence with those systems of the market economies, but in a combination of optimal control techniques and programme budgeting. The author has also included a section entitled 'References and Documentation'. The works noted in this section include some of the material drawn upon by the author, and suggestions for further readings.

Two books by Dr. Paul Einzig have recently been published by MacMillan & Co. Ltd. The first book **Foreign Exchange Crises. An Essay in Economic Pathology**. 2nd edition. (204 pages. £4 (£4.00)) enumerates the wide range of the direct and indirect causes of foreign exchange crises, their symptoms, their effects, and the ways in which Governments have sought to deal with them. This revised edition brings Dr. Einzig's description and analysis of foreign exchange crises up to date. It deals with crises of sterling and the French franc, and with the revaluation of the D mark. The second book, which is published in mid-June is **The Case Against Floating Exchanges.** (211 pages. £4 (£4.00) SBN 333 10044 1) 'Dr. Einzig's book is an outspoken indictment of economists and others agitating in favour of a system which would mean a relapse into the currency chaos of the inter-war period. The author denounces those advocating floating exchanges on the basis of an entirely fallacious theory—that exchange rates, if allowed to find their own level, would float to a rate at which, imports and exports would balance. They overlook the elementary fact that a very considerable proportion of transactions in the foreign exchange market do not originate from imports and exports but from international capital transfers, speculation and arbitrage . . .' – Preface.

Transhipment in the Seventies: a Study of Container Transport. Report prepared by Arthur D. Little Ltd. (49 pages. National Ports Council, 17 North Audley Street, London, W1Y 1WE. £5 5s. (£5.25)). In this study the National Ports Council's consultants examine the belief that the future for deep sea container transport lies in large ships, calling at few ports, and that eventually NW Europe will have only one container port with large volumes of cargo moving on short sea feeder services (transhipment), from this main port. They conclude that, in fact, deep sea container services on most trade routes will visit one British and one continental port, but they add that the significance of quick port time turn round makes it essential that a high effective rate of working is maintained at British ports to keep direct calls to Britain economic. Only in one area do they see a strong case for transhipment where British ports will be in direct competition with continental ports: this is with cargo to and from Scandinavia where the costs of movement to London or Rotterdam are about the same. A summary of the report is contained in the Council's latest **Research and Technical Bulletin**. No. 6, 1970 (47 pages. Available from the Council. 15s. (75p)). This also contains articles on the Touche Ross report on the comparison of continental and British port costs: the report by Bertlin and Partners on port structures, planning for increased throughput at a common user container berth, and a study of maintenance dredging operation on the Tees.

The Company. Law Structure and Reform in Eleven Countries, edited by Charles de Hoghton. (394 pages. Published by PEP, and George Allen & Unwin. £5 5s. (£5.25) SBN 04 347001 7). In 1967 PEP organized a seminar on 'The Future of the Enterprise and the Reform of Company Law'. This seminar was attended by academics and businessmen from eleven countries and their contributions, later fully revised, form the basis of this book. *The Company* is divided into four parts, together with a number of appendices. Part I deals with the distinctions between different legal forms of company and between public and private enterprises. Part II discusses the objectives of the company. Part III is concerned with company organization and control. This section contains a discussion of the powers and accountability of chief executives, the purposes and extent of disclosures, the role and rights of shareholders, employees and consumers and the degree to which private firms are subjected to public control. These three parts are based on contributions from eight countries: Belgium, Britain, France, Germany (Federal Republic), Italy, the Netherlands, Sweden and the USA. Part IV contains three separate chapters on Japan, India, and Yugoslavia which have been set apart from the others because of their special circumstances. This work is intended to contribute to the debate on the reform of company law which has been going on in most industrial countries for a decade or more.

Wages and Labour Economics, by J. M. Jackson. (244 pages. McGraw-Hill. £2 (£2.00) SBN 07 094130 0). The emphasis throughout is on the economics of labour, and on the problems that arise because labour is a scarce productive resource which needs to be allocated in such a way as to make the best use of the available supply. However, institutional matters, such as trade union organization and the law relating to trade unions, are also included because one cannot expect to understand fully how wages are determined or labour allocated between jobs without some knowledge of the institutional framework. The author is Senior Lecturer in Economics at the University of Dundee, and *Wages and Labour Economics* is aimed primarily at university students in their first or second year.

Other Publications

THE ECONOMIC SCENE: AN AUSTRALIAN PERSPECTIVE, by K. F. Ronaldson, K. R. Trimble 215 pages. John Wiley & Sons Inc. £2 5s. (£2.25) SBN 471 73332 6.

Government surplus sales by auction

MINISTRY OF DEFENCE

1970	Stores	Location	Auctioneers
June 30 and July 1	Miscellaneous stores	No. 2 Building (adjoining Indoor Bowling Green), Riverside, Chatham	Fuller, Horsey, Sons & Cassell (Dept. L), 10 Lloyds Avenue, London, E.C.3 (Tel. 01-709 0101)

Generating sets; air compressors; pumping sets; foundry equipment; surface plates; Ford petrol engines; Bedford fire tenders; vehicle spares; lifting tackle; electronic equipment; photographic equipment; hand tools; machine tools; chronometers; wrist watches; stop watches; wallclocks; binoculars; 4,000 galls. undercoats and gloss paint; sisal and coir rope; webbing equipment; battledress trousers and blouses; raincoats; boots and shoes; white and coloured blankets; bedspreads; mattresses; groundsheets; kit bags; carpets; kitchen utensils; crockery and glassware; stacking and dining chairs; tables; desks; bureaux; wardrobes; sideboards and sundry furniture; scrap rubber and textiles; numerous other general stores.

July 8	Miscellaneous stores	TA & VR Centre, Meadowforth Road, Stirling	Dixon & Wallace Ltd. (Dep t. L), Bank Buildings, Graham Square, Glasgow, E.1 (Tel. 041-554 2447)

Bedford fire tenders and 950 gall. refueller; 1-ton Austin truck; Commer van (diesel); excavator conversion set; aircraft and vehicle spares; electrical equipment; X-ray equipment; portable diathermy equipment; Solarton oscilloscopes, photographic equipment; engineers tools; generators; machine tools; prismatic binoculars; parachute canopies, straps, fittings and packs; scrap leather, rubber, webbing and mixed rags; kilts, sporrans, purses; aluminium kitchen utensils; shirts; raincoats; raincoat linings; furniture and large assortment of other general stores.

July 14-15	Miscellaneous stores	Regional Depot RAOC, Hereford	Russell Baldwin & Bright (Dept. L), 20 King Street, Hereford. (Tel. 0432-4366)

Generating sets; electrical equipment including, oscilloscopes, voltmeters, capacitors, alternators, indicators, resistors, transformers, etc.; radio receivers; electric cable; electronic valves; aircraft spares; vehicle spares; various hand tools and engineering equipment; photographic equipment; wooden boxes and chests; paint and dope; steel bin equipment shelves; approx. 1½ tons perspex; miscellaneous furniture; machine tools including, grinder tool and cutter; universal grinders; shearing machine; floor mounted engraving machine; Churchill regrinding machine; lathes; drilling machines; flexible shafts; grinding and buffing machines, etc.

July 22	Vehicles, miscellaneous stores	Queens Hall, Northern Ireland Memorial Buildings, 9/13 Waring Street, Belfast 1	Osborne King & Megran (Dept. L), 14 Montgomery Street, Belfast 1 (Tel. 0232 20233)

Bedford Utilecons, vans, Utilabuses, Scammell tractors; Land Rovers; Morris vans and Mini Minors; mobile cranes; Hillman Huskys; Morris Oxford Travellers; Bargus agricultural trailer; AEC refullers and 5-ton trailer; Reliance trailers; Morris fire truck; Vauxhall Victor; Ford Zephyrs; ambulances; travelling hoist blocks; hardwood boxes; water tanks, various sizes; millboard sheets; metal rack assemblies; large quantities clothing; furniture, kitchen equipment; scrap textiles, etc.

Catalogues of the above sales obtainable from relevant auctioneers about two weeks prior to and up to date of sale, price 1s. 0d. (postal order only)

BY ORDER OF THE SECRETARY OF STATE FOR DEFENCE

To let by tender. 53 Sinclair Road, Hammersmith, W.14 (near Olympia). Substantial brick built three-storey building with office and storage accommodation with unloading facilities. **Comprising approximately 32,000 sq. ft.** Suitable for use as a Warehouse and Retail Depot. Further details and tender documents are obtainable from Defence Land Agent, Ministry of Defence, St. George's House, 195 Waterloo Road, London, S.E.1 (Tel. 01-928 7999). Completed tenders must be returned by 10 a.m. on July 13, 1970.

MINISTRY OF PUBLIC BUILDING AND WORKS

1970	Description of Goods	Location	Auctioneers
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Statistics

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where shown otherwise

Symbols used in all statistical tables are:—
.. not available
– nil or less than half the final digit shown
p provisional
r revised
* five week period
ø fifty-three week period

	Gross Domestic Product (expenditure estimates)	Index of Industrial Production	Consumer's Income and Expenditure				Fixed Capital Expenditure					Increase in Stocks			
							Total	Selected Components				Total	Selected Components		
			Personal disposable income	Total consumers' expenditure		Retail sales		Manufacturing industry	Distributive and service industries	Dwellings	Public sector excluding dwellings		Manufacturing industry	Wholesalers	Retailers
	at 1963 prices		at current prices		at 1963 prices	at 1966 prices	at 1963 prices					at 1963 prices			
Base of index	1963	1963	1963	1963	1963	1966	1963	1963	1963	1963	1963				
£m. in base year	26,826		21,757	20,125	20,125	11,372	4,916	1,055	1,020	944	1,752	Series in £ million			
1964	105	108	107	107	103	..	116	113	119	124	113	642	411	91	50
1965	108	112	115	114	105	..	121	124	118	127	117	400	262	49	50
1966	110	113	122	120	107	100	124	128	114	128	125	241	147	19	6
1967	112	114	127	126	110	101	132	124	120	138	142	169	-39	10	11
1968	115	120	135	135	112	104	139	128	141	144	142	155	-47	81	95
1969	117	123	142	142	112	103	135	135	144	131	131	311	211	-22	37
1968															
1st quarter	115	118	133	134	114	105	138	120	135	146	147	-72	-100	8	49
2nd quarter	113	119	133	131	109	102	136	120	133	147	143	58	24	23	1
3rd quarter	115	120	135	135	112	103	138	128	140	144	138	38	7	12	5
4th quarter	118	122	138	138	113	104	145	144	155	141	141	131	23	39	40
1969															
1st quarter	114	122	140	138	111	102	131	121	135	136	133	95	103	-14	13
2nd quarter	116	123	140	141	113	104	133	135	142	129	129	53	32	- 6	- 3
3rd quarter	117	123	142	143	113	103	137	142	151	132	130	—	-24	- 9	- 1
4th quarter	120	124	146	146	114	103	137	142	148	126	134	163	100	7	28
1970															
1st quarter		124				103		138 p	142 p				64 p	-13 p	-41
1969															
November		125				104									
December		124				103									
1970															
January		123				103									
February		124				104									
March		126				103									
April		125 p				103									

	Orders		Prices and Costs					Labour			Trade		Balance of Payments current balance
	Engineering industries: orders on hand (end period)	Textiles and clothing industries: orders on hand (end period)	Retail price Index		Wholesale price index: non-food manufacturing industry		Basic hourly wage rates (all industries and services)	Wholly unemployed excluding school leavers	Unfilled vacancies for adults	Civil employment	Imports	Exports‡	
	at 1963 prices	at 1958 prices	Index†	% increase on year earlier	Basic materials and fuel used†	Manufactured products: home sales†		Mid-month or monthly average		Quarter or quarterly average	at current prices		
Base of index	Dec. 1963	Apr. 1959	16 Jan. 1962		1963	1963	31 Jan. 1956				1963	1933	series in
£m. in base year								Series in thousands			4,983	4,365	£ million
1964	119	124	107·0	3·3	103·9	101·9	148·6	362	221	24,566	114	105	-393
1965	123	121	112·1	4·8	106·8	104·6	157·9	308	265	24,785	115	113	- 81
1966	118	105	116·5	3·9	110·2	107·3	168·5	323	255	24,834	119	122	40
1967	108	114	119·4	2·5	108·4	108·2	175·3	512	174	24,475	129	121	-322
1968	108	129	125·0	4·7	120·5	112·4	187·3	541	188	24,319	159	150	-297
1969	117	124	131·8	5·4	125·0	115·9	197·4	535	200		167	169	415
1968													
2nd quarter	104	125	125·0	4·5	119·5	112·5	185·8	541	185	24,321	158	142	-107
3rd quarter	104	129	125·7	5·6	119·3	112·8	187·7	547	189	24,276	161	154	- 10
4th quarter	108	129	127·2	5·6	120·4	113·1	191·0	532	202	24,316	160	159	- 68
1969													
1st quarter	111	134	129·7	6·2	122·3	114·1	196·7	532	198	24,317	163	159	23
2nd quarter	119	131	131·8	5·4	124·2	115·1	195·6	519	202	24,277	169	167	74
3rd quarter	116	131	132·0	5·0	126·1	116·5	197·8	547	200	24,205	168	173	147
4th quarter	117	124	133·7	5·1	127·3	118·0	201·6	544	199		169	177	171
1970													
1st quarter	123 p	125 p	136·2	5·0	130·1	120·6	208·8	561	192		172	180	144
2nd quarter								563 p	187 p				
1969													
December	117	124	134·4	4·7	128·4	118·6	205·0	550	200		170	177	
1970													
January	121 p	127 p	135·5	5·0	129·4	119·5	206·1	558	195		167	182	
February	120 p	126 p	136·2	4·9	130·0	120·5	209·4	557	192		172	174	
March	123 p	125 p	137·0	5·1	130·8	121·6	210·9	567	188		176	185	
April	123 p	123 p	139·1	5·6	130·4 p	122·4 p	211·5	567	188		181	187	
May			139·5	6·1	129·0 p	122·7 p	212·5	560	187		177 p	174 p	
June								561 p	187 p				

† Not seasonally adjusted. ‡ Including re-exports

General assessment of the economic situation

From the Treasury's monthly article on the economic situation to be published in the June issue of Economic Trends. *(Note: Unless otherwise stated, this note is based on seasonally adjusted data).*

The external position

IMPORTS of the main industrial countries were more buoyant than expected in the early months of this year, even though domestic output in the United States fell slightly more than had been generally foreseen. United States imports, while they have not risen further since early this year, were 4 per cent higher in the three months February-April than in the second half of 1969; and in Japan and in most European countries demand for imports continued strong. A rapid increase in world prices of internationally traded goods contributed to the further growth in the dollar value of the imports of industrial countries, at an above-average rate, in the first quarter. The prospect for the remainder of 1970 seems to be for a less rapid expansion in the value of trade even if, as expected, domestic demand in the United States begins to pick up again in the second half of the year; world prices are likely to rise less fast, though still at a rate well above the average of past years. But the high level of trade already achieved, together with the persisting and widespread pressures on international costs and prices, may lead to a larger increase in trade (in value terms) between 1969 and 1970 than appeared likely five or six months ago.

In the first quarter of 1970, the United Kingdom current balance was in surplus by £144 million. The visible surplus was higher than in the preceding quarter, but the invisible surplus – which fluctuates from quarter to quarter – was lower, a major feature being a drop in income from United Kingdom direct investment abroad. With a small deficit of £25 million on the long-term capital account, there was a substantial surplus of £119 million in the basic balance. The restoration of confidence in the stability of the major currencies and tight credit conditions in the United Kingdom appear to have been the main factors underlying a massive inflow of funds in the first quarter.

Taking the first five months of this year, the current balance has continued in substantial surplus, with visible trade alone running close to balance. In May, exports were £46 million lower than in April at £633 million (fob); imports (excluding United States military aircraft) were £20 million lower at £730 million (cif); and the visible trade balance was in deficit by £31 million. The export total, however, was erratically low relative to the recent trend and is partly explained by shipment delays resulting from a dock dispute at Southampton; while the import figure was swollen by the inclusion of two Boeing 747 civil aircraft (out of a total of three to be imported this year) valued together at £18½ million and by the arrival of some delayed shipments from Canada. Over the three months March-May, exports were 2 per cent higher than in the preceding three months, while imports were 5 per cent higher, giving an average monthly deficit on visible trade in March-May of £13 million against a corresponding surplus of £11 million in the preceding three months. The recent run of trade figures indicates a continuing expansion in the value of exports, with the volume of shipments remaining at a high level; within the total, the trend of machinery exports has been firmly upwards, and export orders on hand in the engineering and allied industries at the end of March were almost one-fifth greater, on the provisional estimates, than a year earlier. The value of imports has also been rising, reflecting both higher prices and some increases in volume.

Any assessment of the competitive position of the United Kingdom can result in only very general conclusions, not only because of the difficulties in obtaining comparable statistics of the movement in export prices and unit wage costs in competitor countries, but also because of the influence of cyclical changes on unit wage costs and the lack of information on non-wage labour costs. But nevertheless it would appear that at the end of last year the benefit to the United Kingdom competitive position afforded by devaluation had been broadly maintained. In the fourth quarter of 1969, the dollar prices of United Kingdom exports of manufactured goods were about 3 per cent lower than in the third quarter of 1967 – the quarter preceding devaluation – whereas those of our major competitors (the United States, France, Germany, Italy and Japan) were, on average, higher by some 6-7 per cent.† At the end of the same period, unit wage costs in United Kingdom manufacturing, again in dollar terms, were about 7 per cent† lower than in 1967 third quarter. Those of our

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major competitors were around 8 per cent† higher, thus leaving intact the wage cost advantage accruing to United Kingdom exporters as a result of devaluation. In the first quarter of this year, United Kingdom export prices of manufactured goods were about 1¼ per cent higher than in the preceding quarter and unit wage costs were also significantly higher; both export prices and unit wage costs have probably continued their upward movement abroad also, but it is not yet possible to assess these movements relative to the United Kingdom.

The domestic economy

Comprehensive estimates of national income and expenditure in the first quarter are not yet available, but our provisional assessment from output and expenditure data is that the underlying level of gross domestic product showed no increase over the fourth quarter of 1969. The output estimate of gross domestic product is likely to register some increase; industrial production is provisionally estimated to have shown a rise but preliminary information suggests that this might have been offset in the service industries. On the expenditure side, both consumers' expenditure and export of goods and services appear to have remained stable. The volume of investment by manufacturing industry was somewhat lower and capital expenditure by the distributive and service industries also fell. The preliminary estimates confirm earlier indications that recorded stockbuilding in the first quarter was low; while stocks held by manufacturers showed an increase (of about £60 million at 1963 prices), there was an offsetting fall (of about £50 million) in stocks in the distributive trades. The low rate of stockbuilding recorded for the first quarter follows the high rate recorded in the preceding quarter, and may be partly explained by timing factors.

Forecasts of capital expenditure in 1970 and 1971 provided by the Ministry of Technology indicated that there had been, in aggregate, no change in manufacturers' investment intentions since the inquiry at the end of 1969. But it seems doubtful whether the strength of these intentions (which indicate an increase between 1969 and 1970 of about 7-8 per cent‡ in real terms) is consistent with the recent course of recorded expenditure. In the first quarter of 1970, the volume of manufacturing investment was 3 per cent below the revised figure for the fourth quarter of last year, itself now estimated to have been virtually the same as in the preceding quarter. To achieve an increase between 1969 and 1970 consistent with the buoyancy of intentions would mean a very substantial rise for the remainder of the year. While this remains possible – the first quarter's figures may prove to have been abnormally low – it may be that the rate of increase between 1969 and 1970 will be rather below that suggested by the intentions inquiries of November-December 1969 and May 1970. Some further growth in plant and machinery investment is also foreshadowed by the order book position in the engineering industries: home orders on hand in March were 6 per cent higher than a year earlier.

For the distributive and service industries (excluding shipping) the company forecasts supplied to the Board of Trade in May suggest little change, or perhaps a small increase, in the volume of expenditure between 1969 and 1970 with some further increase in 1971. For the shipping industry, forecasts suggest little change in the volume of investment between 1969 and 1970, and that the high rate of expenditure achieved in 1968 and 1969 will be maintained. For 1971, a considerable increase is expected.

The indications are that the subdued behaviour of consumers' expenditure in the first quarter persisted in April, when the volume of retail sales and new car registrations stayed close to the first quarter level. Personal consumption in volume terms has been stable despite a significant rise in money incomes in the first quarter: the monthly index of average earnings was 2½-3 per cent higher than in the fourth quarter of 1969. However, it is not yet clear how real personal disposable incomes changed over the same period. In April consumer spending may have been restrained by the extent of the increase in retail prices.

In the first four months of this year, retail prices (not seasonally adjusted) rose by about 3½ per cent, but about one-fifth of this increase was accounted for by increases in seasonal food prices. With the reversal of these seasonal movements and the slower rise in import prices since the beginning of the year, the rate of increase of retail prices should moderate in the summer months. Together with the initial effects of the Budget measures, this is expected to lead to an acceleration in real personal disposable incomes and consumers' expenditure.

† These figures are based on the data published in the May issue of the National Institut Economic Review. Italy has been excluded from the unit wage cost comparison because o the distorting effects of strikes on output and earnings in the fourth quarter of 1969.

‡ After allowing for the effects of the cessation of the temporarily higher rate of investment grant at the end of 1968.

EFTA trade in the first quarter of 1970

EFTA's trade continued to expand in the first quarter of 1970. Total EFTA† imports amounted to $US11,776 million and were nearly 14 per cent higher than in the first quarter of 1969. Exports, at $US9,973 million were 14·7 per cent higher than in the first quarter of 1969. Seasonally adjusted figures show that from the fourth quarter of 1969 to the first quarter of 1970 total EFTA imports rose by 4·8 per cent, and exports increased by 5·8 per cent. From February to March 1970, seasonally adjusted imports and exports rose by 0·7 per cent and 0·8 per cent respectively.

Intra-EFTA trade

Trade between EFTA members in the first quarter of 1970 amounted to $US2,723 million (f.o.b.). This amounts to over 27 per cent of EFTA's total trade, and shows a rise of 17·3 per cent over the first quarter of 1969. Seasonally adjusted figures show a rise of 6·4 per cent in intra-EFTA trade between the fourth quarter of 1969 and the first quarter of 1970, with a rise of 1 per cent between February and March 1970. This intra-EFTA trade growth rate is higher than the growth rates of exports to the world, to the United States and to the EEC; this is true both when the first quarter of 1970 is compared with the fourth quarter of 1969 and when comparing March 1970 with February 1970.

In percentage terms the biggest increases in intra-EFTA trade were achieved by Finland, Austria and the United Kingdom, with exports 37, 33 and 25 per cent higher repectively than in the first quarter of 1969, but in terms of value the biggest gains were achieved by the United Kingdom and Sweden. All the EFTA countries increased their exports within the area between the two quarters, and for all except Denmark and Portugal the rate of growth was higher than that of their total exports. On a comparison of the figures for March last year and this, it appears that only Austria, Finland, Switzerland and the United Kingdom increased their exports to EFTA at a faster rate than to the world.

EFTA trade with the EEC

Total EFTA imports from the EEC in the first quarter of 1970 were 18·4 per cent higher than in the first quarter of 1969, and reached the sum of $US3,715 million. Exports at $2,611 million were 14·8 per cent up over the same period. Seasonally adjusted figures show that both EFTA imports from and exports to the EEC grew, between the last quarter of 1969 and the first quarter of 1970, by 5·2 per cent. Switzerland, Finland and Portugal reported the largest percentage increases in imports from the EEC. The fastest growth rates in exports to the EEC were recorded by Norway, Finland and the United Kingdom, but in value terms the United Kingdom accounted for almost half of the rise in these exports. Norway's exports to the EEC rose by 20·2 per cent, while its total exports, and its exports to EFTA and the United States, actually fell; exports of ships were probably an important factor in this development.

EFTA trade with the United States

The large increases in EFTA imports from the United States compared both with the first quarter and with March 1969 are to a considerable extent a consequence of the American dock strike. Thus, although EFTA imports from and exports to the United States in the first quarter of 1970 were 31·4 and 19·0 per cent higher respectively than a year earlier, seasonally adjusted figures show increases of only 0·6 and 0·1 per cent between the fourth quarter of 1969 and the first quarter of this year. Only Finland and Norway showed a fall in exports to the United States compared with the first quarter of the previous year, while the largest percentage increases in exports were recorded by Portugal, Sweden and the United Kingdom, with rises of 38·2, 25·9 and 27·6 per cent.

EFTA trade with the rest of the world

EFTA exports to the rest of the world in the first three months of this year were nearly 12 per cent higher than in the first quarter of 1969. With the exception of Norway all the EFTA countries reported increases in this trade. Imports from the rest of the world grew by only 4 per cent although all the EFTA countries other than the United Kingdom increased their imports.

† Excluding Iceland

United Kingdom trade in May

SUMMARY

THE VISIBLE TRADE BALANCE in May, seasonally adjusted and excluding United States military aircraft, was in deficit by £31 million: the imports however included two Boeing 747 aircraft (out of a total of three to be imported in 1970) which were together valued at £18½ million, and a dock dispute at Southampton led to some significant postponement of exports. Partly reflecting these factors and the arrival of delayed imports from Canada, there was a deficit on visible trade in the three months March-May averaging £13 million a month. In the previous three months there was a surplus averaging £11 million a month.

TABLE 1A

Seasonally adjusted values — £ million per month

	Exports fob§	Imports cif		Visible trade balance§†
		Total	Excl. US military aircraft, etc.	
1968	547 (536)	658	646	- 44 (- 55)
1969	615 (611)	694	678	- 8 (- 12)
1968 1st quarter	532 (521)	647	641	- 47 (- 57)
2nd quarter	516 (506)	642	633	- 64 (- 74)
3rd quarter	562 (550)	666	654	- 37 (- 48)
4th quarter	578 (567)	678	657	- 31 (- 42)
1969 1st quarter	577 (565)	677	660	- 31 (- 43)
2nd quarter	608 (596)	700	678	- 18 (- 30)
3rd quarter	631 (637)	696	680	+ 7 (+13)
4th quarter	645 (648)	701	693	+10 (+13)
1970 1st quarter	656	714	712	+11 r
1969 December	645	705	702	+ 5
1970 January	663	693	692	+36 r
February	634	715	713	- 8 r
March	672	731	730	+ 4
April	679	752	750	- 10pr
May p	633	733	730	- 31 p
1969 Dec.-Feb. 1970	647	704	702	+11
1970 March-May	662	739	737	- 13

† Excluding transactions relating to US military aircraft financed by Exim bank credit. (See note 2 (b).)

§ Including adjustments for special factors affecting the recording of exports: figures excluding the adjustments are shown in brackets.

TABLE 1B. Three-monthly averages‡

Seasonally adjusted values — £ million per month

1969 June	608	700	678	- 18
July	617	706	682	- 13
August	633	706	686	0
September	631	696	680	+ 7
October	641	694	681	+18
November	640	696	687	+12
December	645	701	693	+10
1970 January	653	698	694	+20
February	647	704	702	+11
March	656	714	712	+11
April	662	733	731	- 5
May	662	739	737	- 13

‡ Average of month shown and two preceding months. (See Note 2 (c).)

Exports and imports

Exports in May were £633 million f.o.b. seasonally adjusted. This figure is erratically low in relation to the recent trend. In the three months March-May, exports averaged £662 million a month, 2 per cent higher than the rate of £647 million in the previous three months. Imports in May were £730 million c.i.f., seasonally adjusted and excluding United States military aircraft. In the latest three months they averaged £737 million a month, an increase of 5 per cent compared with the average of £702 million in the three months December-February.

Invisibles

The surplus on invisibles is estimated by the Central Statistical Office to have been running recently at about £40 million a month.

Brief assessment

The trend of recent figures indicates some further growth in the value of exports, with the volume continuing at a high level. The value of imports has also increased, reflecting both higher prices and some increase in volume.

Visible trade for the first five months of this year has been running close to balance and the current account of the balance of payments has continued in substantial surplus.

EXPORTS

Exports in May were £633 million, seasonally adjusted. This total follows the high figures of £679 million in April and £672 million in March and is probably an erratic fluctuation, to which the Southampton dock delays contributed. Exports of machinery, a category which includes shipments of large items liable to vary from month to month

TABLE 1C

Recorded values — £ million per month

	Exports fob‖	Imports cif	
		Total	Excl. US military aircraft, etc.
1968 1st quarter	522·3	665·1	658·6
2nd quarter	522·3	646·1	637·6
3rd quarter	524·3	649·3	636·9
4th quarter	575·7	672·0	650·8
1969 1st quarter	555·5	687·2	670·9
2nd quarter	618·8	706·0	684·1
3rd quarter	611·3	676·7	661·2
4th quarter	660·3	704·6	696·3
1970 1st quarter	649·5	715·4	713·5
March	693·1	725·7	724·1
April	690·5 r	808·4 r	806·2 r
May p	672·9	749·1	745·9

‖ No adjustment has been made in this table for special factors affecting the recording of exports.

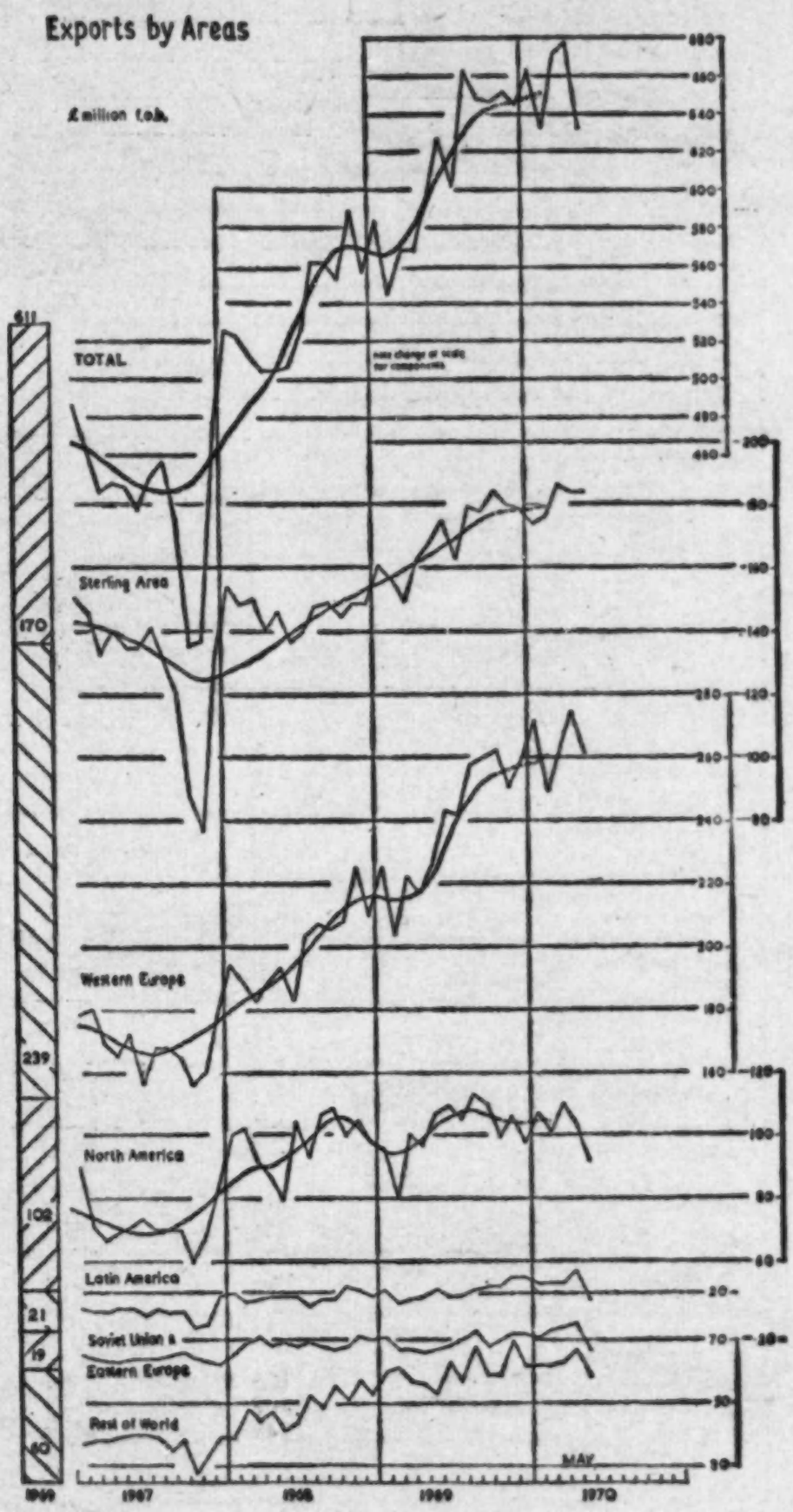
Table 2. Exports: Areas† (*See chart on opposite page*)

Seasonally adjusted values — £ million fob per month

	Total	Sterling Area	Western Europe			North America	Latin America	Soviet Union & Eastern Europe	Rest of World
			Total	EEC	EFTA				
1969	611	170	239	127	90	102	21	19	60
2nd quarter	596	169	229	121	87	104	20	17	57
3rd quarter	637	173	253	133	95	109	20	20	61
4th quarter	648	181	257	139	96	102	24	21	64
1970 1st quarter	656	180	262	139	102	107	23	23	63
March	672	187	263	139	101	110	23	24	63
April	679	184	275	143	110	103	27	25	67
May p	633	184	261	136	103	92	18	17	59
1969 Dec.-Feb. 1970	647	176	260	140	100	102	24	22	62
1970 Mar.-May p	662	185	266	139	104	102	23	22	63

† No adjustment has been made in this table for special factors affecting the recording of exports.

were £24 million lower in May; the trend for machinery exports this year has however been firmly upwards against a background of growing export order books in the engineering industries.



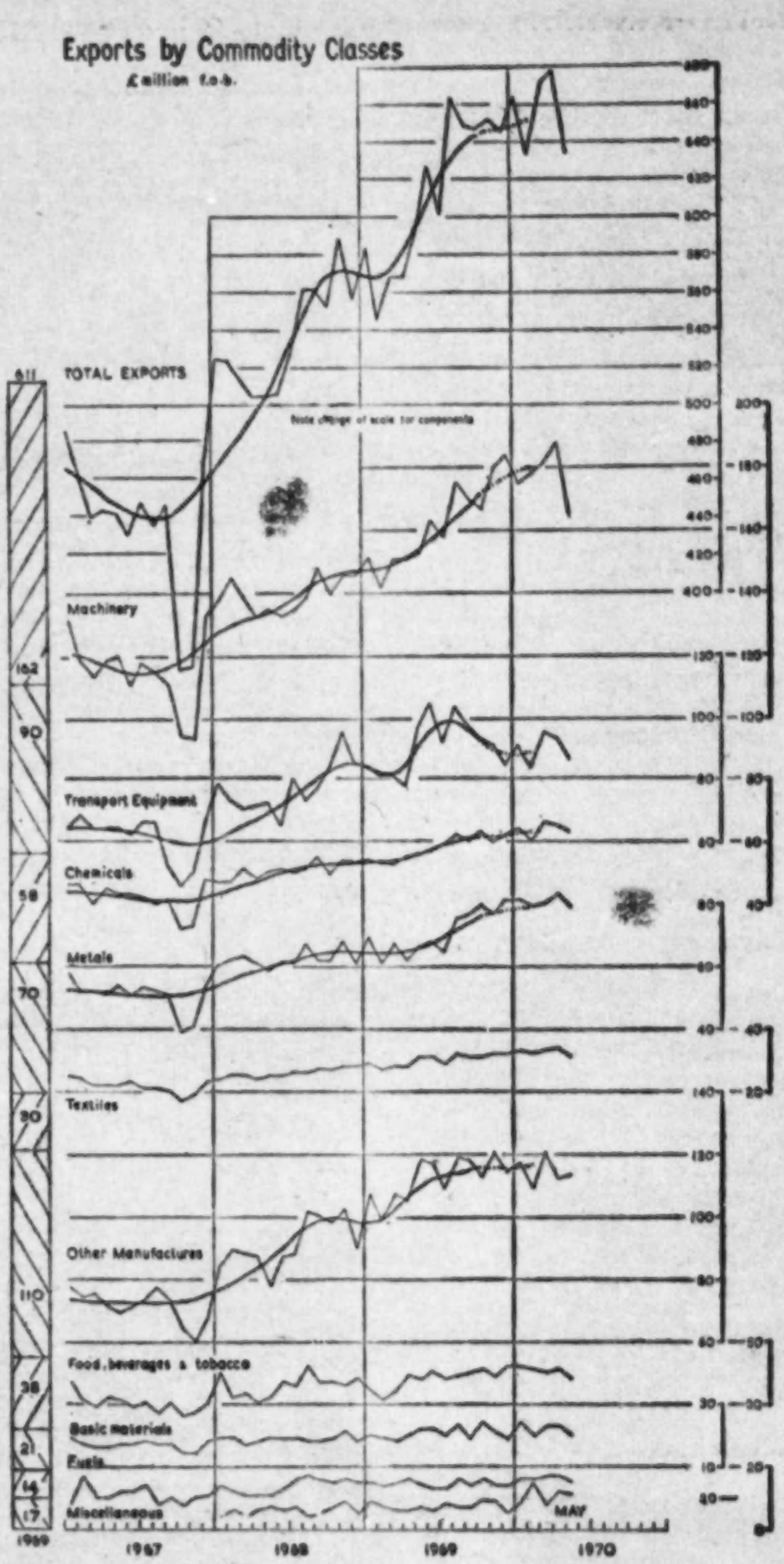


Table 3. Exports: Commodity classes†

Seasonally adjusted values

£ million fob per month

	Total	Food, beverages and tobacco	Basic materials	Fuels	Manufactures									Miscellaneous
						Machinery and transport equipment								
					Total	Total	Machinery	Road motor vehicles	Other transport equipment	Chemicals	Metals & misc. metal manufactures	Textiles	Other manufactures	
1969	611	38	21	14	521	253	162	66	24	58	70	30	110	17
2nd quarter	596	39	21	14	507	249	156	66	26	56	65	30	107	16
3rd quarter	637	39	21	14	547	268	168	70	25	60	72	31	115	17
4th quarter	648	41	21	15	552	266	177	66	24	62	79	32	115	18
1970 1st quarter	656	41	22	16	555	266	178	70	22	63	80	33	115	21
March	672	40	23	17	572	277	181	73	24	66	80	33	120	18
April	679	41	23	17	575	283	188	67	28	65	83	34	112	22
May p	633	38	20	15	539	252	164	66	21	63	79	31	113	21
1969 December-February 1970	647	42	21	15	550	263	179	67	20	62	80	32	113	20
1970 March-May p	662	40	22	17	562	270	178	69	24	64	81	33	115	21

† No adjustment has been made in this table for special factors affecting the recording of exports.

(Continued on next page)

UNITED KINGDOM TRADE IN MAY, *continued*

General comment

In the three months March-May, exports averaged £662 million a month, 2 per cent higher than the rate of £647 million in the previous three months. The trend in the value of exports continues upwards largely reflecting higher prices.

EXPORTS fob

Seasonally adjusted	£ million a month	
	Month	Three-month average
1969		
September	633	631
October	636	641
November	651	640
December	645	645
1970		
January	663	653
February	634	647
March	672	656
April	679	662
May	633	662

Market pattern

Between the latest two periods of three months there was a strong rise, of 5 per cent, in exports to the sterling area and there were increases of 2 per cent in shipments to Western Europe (mainly to the EFTA countries), and to 'the rest of the world' group of countries. There was little change in exports to North America, Latin America and the Soviet Union and Eastern Europe, although the figures for some of these markets were affected by the lower shipments of machinery in May.

Commodity pattern

The low May figure also affected the three months' average for exports of machinery which was 1 per cent down on the previous three months. Exports of road motor vehicles were 2 per cent higher, chemical exports increased by 4 per cent and there were rises in most other commodity classes.

IMPORTS

Imports in May were £730 million c.i.f. (seasonally adjusted and excluding United States military aircraft); the total including these aircraft was £733million. As already indicated, the May import figure included two Boeing 747 civil aircraft valued at £18½ million; the third and last aircraft of this year's programme is to be delivered in June.

IMPORTS cif excluding US military aircraft, etc.

Seasonally adjusted	£ million a month	
	Month	Three-month average
1969		
September	683	680
October	689	681
November	689	687
December	702	693
1970		
January	692	694
February	713	702
March	730	712
April	750	731
May	730	737

General comment

In the three months March-May imports (excluding United States military aircraft) averaged £737 million a month, 5 per cent more than the average of £702 million a month in December-February. Higher prices have contributed to the increase but much of the rise in recent months reflects a higher volume. There was a particularly high rate of imports from Canada (despite a somewhat lower figure in May), partly

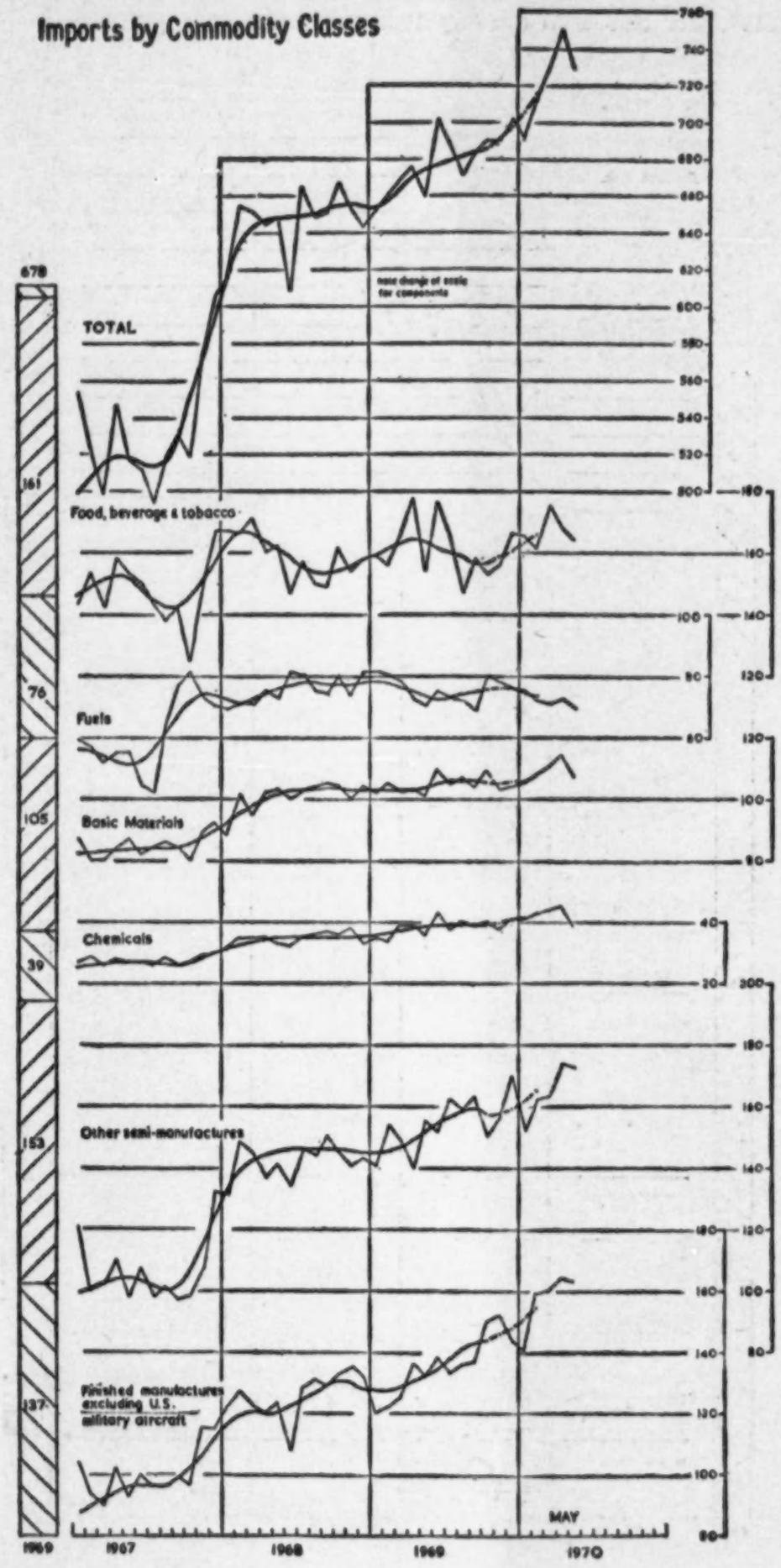
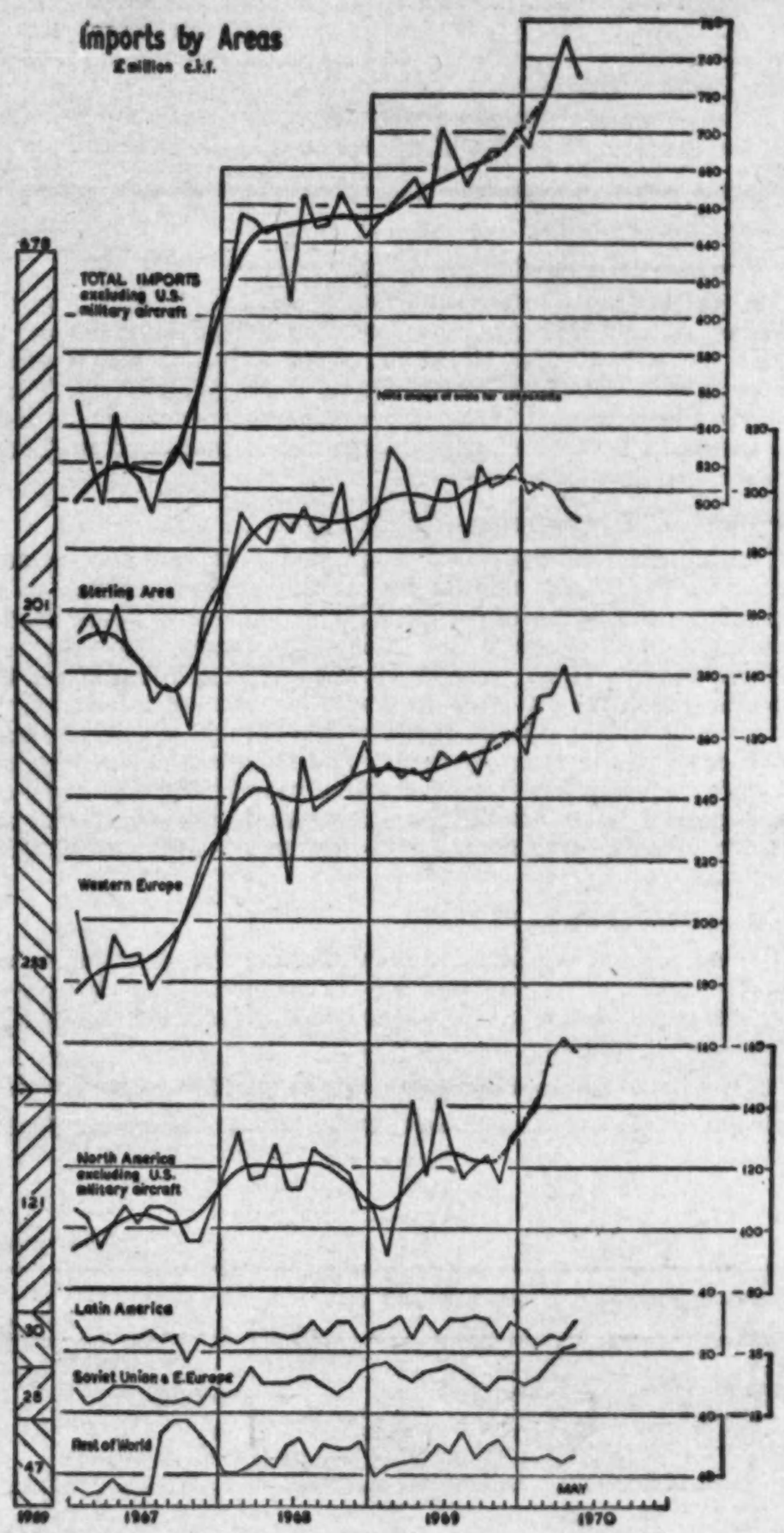


Table 4. Imports: Commodity classes

Seasonally adjusted values — £ million cif per month

	Total	Total, excluding US military aircraft, etc.	Food, beverages and tobacco	Fuels	Industrial materials				Finished manufactures		Miscellaneous
					Total	Basic materials	Chemicals	Other semi-manufactures	Total	Excluding US military aircraft, etc.	
1969	694	678	161	76	296	105	39	153	153	137	7
2nd quarter	700	678	169	73	291	104	40	148	160	138	8
3rd quarter	696	680	157	72	304	106	39	160	153	138	7
4th quarter	701	693	158	78	303	105	40	158	156	149	7
1970 1st quarter	714	712	168	74	309	107	43	159	155	153	9
March	731	730	175	71	317	110	44	163	161	160	9
April	752	750	168	73	333	114	45	174	166	164	10
May p	733	730	164	70	319	107	39	173	166	163	11
1969 December-February 1970	704	702	164	74	309	106	42	161	150	148	7
1970 March-May p	739	737	169	71	322	110	43	169	165	162	10



owing to sharply increased shipments of nickel and timber following the ending of the Canadian mineworkers' and dockers' strikes.

Commodity pattern

All main classes of imports except fuels increased between the last two three monthly periods. There was a moderate increase in imports of food and a somewhat larger increase in industrial materials reflecting in particular increased arrivals of metal ores, iron and steel and non-ferrous metals, including Canadian nickel. Imports of finished manufactures increased sharply with arrivals of machinery higher and 'other transport equipment', mainly ships and aircraft, up from £7 million a month in December-February to £12 million a month in March-May, entirely owing to the high imports of civil aircraft.

Sources of imports

Imports from Canada in the latest three months were running some £12 million a month higher than in the previous three months. Imports from the United States were also sharply higher. There was a somewhat smaller increase in imports from Western Europe and some decline in arrivals from the sterling area.

IMPORT DEPOSITS

It is announced by HM Customs that gross receipts of import deposits in May amounted to £69 million; repayments were £94 million. The rate of deposit was reduced from 40 per cent to 30 per cent on May 1.

OTHER FACTORS IN THE TRADE BALANCE

The net adjustment to the seasonally adjusted figures to derive the visible trade balance (explained in greater detail in Note 2(a) amounted to a credit of £67 million in May, compared with £61 million in April.

VISIBLE TRADE BALANCE

Seasonally adjusted — £ million a month

	Month	Three-month average
1969		
September	+13	+ 7
October	+ 3	+18
November	+20	+12
December	+ 5	+10
1970		
January	+36	+20
February	- 8	+11
March	+ 4	+11
April	- 10	- 5
May	- 31	- 13

VISIBLE TRADE BALANCE

There was a deficit on visible trade in May of £31 million, seasonally adjusted and excluding United States military aircraft; the imports however included the two Boeing 747 aircraft: and a dock dispute at Southampton led to some significant postponement of exports (imports were not affected). Partly reflecting these factors and the arrival of delayed imports from Canada, there was a deficit in the three months March-May averaging £13 million a month. In the previous three monthly period there was a surplus averaging £11 million a month. Taking the first five months of the year the visible trade balance was in deficit by £2 million a month.

(*Continued on next page*)

Table 5. Imports: Areas

Seasonally adjusted values — £ million cif per month

	Total	Total excluding US military aircraft, etc.	Sterling Area	Western Europe	North America		Latin America	Soviet Union and Eastern Europe	Rest of World
					Total	Excluding US military aircraft, etc.			
1969	694	678	201	253	136	121	30	28	47
2nd quarter	700	678	193	250	155	133	29	27	46
3rd quarter	696	680	201	251	138	122	31	28	49
4th quarter	701	693	204	260	131	124	29	25	49
1970 1st quarter	714	712	202	269	146	144	26	28	46
March	731	730	200	274	157	155	26	32	46
April	752	750	193	283	165	162	25	37	45
May p	733	730	190	268	161	158	31	38	47
1969 December-February 1970	704	702	203	263	138	135	27	26	46
1970 March-May p	739	737	194	275	161	159	27	36	46

UNITED KINGDOM TRADE IN MAY, *continued*

CURRENT ACCOUNT

In addition to visible trade, the current account of the balance of payments includes net invisible earnings. These are estimated by the Central Statistical Office to have been running recently at about £40 a month. During 1969 they averaged £48 million a month and in the first quarter of this year £37 million a month. The third element making up the full current account is the payment for United States military aircraft. These payments, which differ from the value of arrivals, averaged £2 million a month in the second half of 1969, and were negligible in the first five months of this year. The payments have been made largely out of corresponding loans from the Export-Import bank which are included as a credit in the capital account of the balance of payments.

NOTES

1. Detailed particulars of United Kingdom imports and exports will be published on June 25† and further analysis of the figures will be found in the form of tables in the monthly Report on Overseas Trade‡ for July, due to be published on or about July 27.

2 (a) Visible trade balance

The figures for the visible trade balance are on a balance of payments basis and are estimates and liable to revision. They are only published seasonally adjusted. In order to obtain the best guidance as to the trend of the trade balance, figures for several months should be taken together.

The visible trade balance is obtained by making a number of adjustments to the figures recorded in the monthly Trade Statistics. Some are valuation adjustments, the principal of which is the deduction from the import figure of freight and insurance costs. The other adjustments relate to coverage, either to bring in items not in the Trade Statistics (for example on the import side ships built and delivered abroad direct to United Kingdom owners) or to remove items which are in the Trade Statistics (mainly returned goods and goods for processing and repair). These adjustments are described in greater detail in the annual 'Pink Book,' 'United Kingdom Balance of Payments 1969' (Table 5 and pp. 66-68).

A run of recent figures summarizing the adjustments is given below:

INDEX OF REGULAR STATISTICS

When did the Board of Trade Journal *last publish an article on the chemical industry? Which issue gives the latest figures on United Kingdom overseas trade, engineering production, hire purchase, wholesale prices, etc?*

An index of the date on which all regular statistical articles were last published will be found on the page following contents page.

(b) Purchases of United States military aircraft

The calculation of the visible trade balance excludes transactions, whether deliveries or payments, relating to the purchase of United States military aircraft (including some missiles) which are being financed by the special United States Exim Bank credit. The effect of these transactions on the balance of payments accounts is shown in the quarterly balance of payments statistics published in 'Economic Trends.'

(c) Three-monthly averages of trade figures

The sequence of individual monthly figures, even when seasonal influences have been allowed for, is usually too variable to give a satisfactory indication of the underlying trend. One simple method of securing a better guide to underlying movements is to take averages of three months. These averages, for the month in question and the two preceding months, are given in Table 1B and are referred to in the commentary on the figures. The averages are still sensitive to irregular movements in the monthly figures and to special influences, though they are markedly less variable than the monthly figures. More elaborate estimates of trend can be constructed, but the three-monthly average gives a quite good short-term guide and has the merit of simplicity.

(d) Recording of exports

For an account of special factors affecting the recording of exports and net figures of adjustments on this account up to October of last year, see pages 1100 and 1101 of the *Board of Trade Journal* of April 22, 1970 (United Kingdom trade in April).

†Overseas Trade Statistics of the United Kingdom May 1970, HMSO, price 6s. (annual subscription £19 4s.).

‡ Report on Overseas Trade, published by HMSO, price 6s. (annual subscription £3 16s.) .

Calculation of visible trade balance (Note 2(a))

Seasonally adjusted values

£ million per month

	Exports			Imports (excluding US military aircraft, etc.)				Visible Trade Balance†
	Overseas Trade Statistics basis† (fob) (1)	Coverage adjustments (2)	Balance of Payments basis† (fob) (3)	Overseas Trade Statistics basis (cif) (4)	Freight, insurance and other valuation adjustments (5)	Coverage adjustments (6)	Balance of Payments basis (fob) (7)	(8)
1968	547	-24	523	646	-66	-13	567	- 44
1969	615	-27	588	678	-68	-14	596	- 8
1st quarter	577	-26	551	660	-68	-10	582	- 31
2nd quarter	608	-30	578	678	-67	-16	596	- 18
3rd quarter	631	-25	606	680	-67	-15	598	+ 7
4th quarter	645	-27	618	693	-70	-15	608	+10
1970 1st quarter	656	-26	630	712	-73	-20	620	+11
1969 December	645	-22	624	702	-71	-11	619	+ 5
1970 January	663	-23	639	692	-73	-16	603	+36
February	634	-28	605	713	-72	-28	613	- 8
March	672	-26	646	730	-73	-15	642	+ 4
April	679	-29	651	750	-77	-12	661	- 10
May	633	-24	609	730	-76	-15	640	- 31

Figures in columns 3 and 7 are the result of applying the respective adjustments to columns 1 and 4. Column 8 is the difference of columns 3 and 7. Components and totals throughout are rounded independently.

† These figures are after adjusting for special factors affecting the recording of exports.

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Index of industrial production for April

THE PROVISIONAL index of production for April 1970, prepared by the Central Statistical Office, is 125 (seasonally adjusted). For manufacturing industry alone the figure is 128.

For the three months February 1970 to April 1970, it is provisionally estimated that production as a whole was 1.1 per cent higher than in the preceding three months, November 1969 to January 1970, for manufacturing industries alone the increase was 0.7 per cent.

The average index numbers for the latest three months and the previous three months shown at the foot of the table give a general guide to the changes which have taken place in the output of the major industry groups in recent months.

Seasonally adjusted

1963 = 100

	Total all industries	Mining and quarrying	Manufacturing industries														
			Total	Food drink and tobacco			Coal and petroleum products	Chemicals and allied industries	Engineering and allied industries								
				Total	Food	Drink and tobacco			Total	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering	Vehicles and aircraft	Metal goods, n.e.s.		
Weights	1,000	56	749	84	55	29	7	64	313	90	10	68	15	81	49		
1965	111·7	96	112·4	105	103	109	115	117	113	115	120	109	95	114	117		
1966	113·2	90	114·2	109	107	112	122	123	116	123	122	121	93	112	110		
1967	113·9	89	114·2	111	109	115	116	130	116	123	123	129	90	106	105		
1968	119·8	85	121·4	116	112	122	126	140	122	125	135	137	87	117	113		
1969	122·9	80	125·6	119	116	125	139	149	127	131	147	144	85	119	119		
1968 1st quarter	118	87	118	114	111	120	116	136	119	123	135	135	87	110	111		
2nd quarter	119	85	120	112	109	118	126	138	121	125	132	140	88	112	114		
3rd quarter	120	84	122	117	113	124	133	141	124	126	137	138	87	121	114		
4th quarter	122	84	124	117	113	124	131	145	126	129	135	137	85	124	115		
1969 1st quarter	122	81	124	115	114	117	140	144	124	127	146	142	85	113	121		
2nd quarter	123	80	126	118	115	125	137	148	127	132	151	142	86	120	120		
3rd quarter	123	80	126	119	114	128	140	151	129	132	151	149	85	122	117		
4th quarter	124	76	127	123	120	128	141	154	128	134	141	144	86	121	119		
1970 1st quarter	124	80	127	121	116	130	154	149	129	136	157	147	86	117	117		
1969 November	125	80	128	123	120	129	142	150	132r	136	142	146	86	126	124		
December	124	80r	127	122	120	125	140	154	127r	135	130	139	86	123	118		
1970 January	123	79	125	120	114	131	149	150	126	129	154	140	85	124	110		
February	124	81	127	121	117	130	160	148	129	139	146	146	86	115	121		
March	126	81	129	122	118	129	152	150	132	140	170	156	86	112	121		
April p	125	81	128	121	117	127	138	154	131	143	166	150	85	110	121		
November-January (av.)	124	80	127	122	118	128	144	151	128	133	142	141	86	124	117		
February-April (av.) p	125	81	128	121	117	129	150	151	150	141	161	151	86	113	121		

	Manufacturing industries (continued)													Construction	Gas, electricity and water
	Metal manufacture			Textiles, leather and clothing				Bricks, pottery, glass, etc.			Timber, furniture, etc.	Paper, printing and publishing	Other manufacturing industries		
	Total	Ferrous	Non-ferrous	Total	Textiles	Leather, leather goods and fur	Clothing and footwear	Total	Bricks, cement, etc.	Pottery and glass					
Weights	60	46	14	88	56	4	27	29	19	10	21	59	25	127	68
1965	118	120	113	108	108	104	107	117	121	110	113	111	117	114	112
1966	111	112	108	107	108	102	106	116	118	112	110	115	120	115	117
1967	105	105	104	103	105	90	101	120	124	112	111	114	123	119	121
1968	111	111	111	113	119	93	104	127	130	122	118	118	135	122	128
1969	114	116	109	116	123	94	103	128	127	129	111	123	142	119	136
1968 1st quarter	106	107	104	110	115	91	104	126	130	119	122	118	130	121	130
2nd quarter	109	110	108	112	118	94	103	127	130	122	115	117	133	123	125
3rd quarter	112	112	110	114	121	94	104	126	129	120	119	118	137	122	128
4th quarter	115	115	112	116	123	95	104	130	132	127	119	120	140	123	129
1969 1st quarter	115	116	112	115	122	97	104	128	126	132	113	122	136	118	143
2nd quarter	117	118	115	118	127	95	103	130	129	131	105	122	143	122	133
3rd quarter	111	112	109	115	122	93	103	126	126	126	110	124	146	118	131
4th quarter	115	119	102	115	124	91	101	127	125	129	114	125	142	117	137
1970 1st quarter	115	119	102	116	124	92	103	128	125	132	106	123	145	114	149
1969 November	115	118	108	117	126	91	101	128	128	127	119	124	143		136
December	118	126	96	113	121	88	99	124	121	130	107	127	141		145
1970 January	110	112	102	114	122	90	101	126	123	132	106	124	145		143
February	118	122	103	116	125	92	103	129	125	136	110	123	139		150
March	117	122	102	116	124	93	104	127	127	128	102	123	149		154
April p	113	117	100	116	124	93	104	119	125	109	117	121			153
November-January (av.)	115	118	102	115	123	90	100	126	124	129	111	125	142†		141
February-April (av.) p	116	121	102	116	124	93	104	125	126	124	110	122	145†		152

† Latest available 3 months (January-March) and previous 3 months (October-December).

Deliveries and orders in the engineering industries

PROVISIONAL FIGURES are now available of deliveries and orders in the engineering industries for the first four months of 1970. However response in such that the April figures should be treated with caution and the first quarter remains subject to revision. The main points to be derived from these latest figures are as follows.

a. Production is now shown to have risen in the first quarter in mechanical and instrument engineering whilst electrical engineering has remained steady (Table 1). Although April figures are slightly lower the three monthly comparison suggests a continuation of the rise.

b. The delivery figures (Table 2) suggest the same picture as production for 1970 so far with increases in both home and export deliveries.

c. A steep increase has occurred since the end of 1969 in export net new orders mainly because of some large orders in the generator and process plant industries.

d. Although the three monthly comparison suggests a drop in home net new orders this is affected by the low April figure which is still subject to revision. Comparisons over a longer period suggest a slight increase in home net new orders.

Description of the statistics

The volume indices of production in Table 1 relate to the engineering and electrical goods industries as defined in Orders VII, VIII and IX of the Standard Industrial Classification. The statistics of orders and deliveries in the engineering industries given in Table 2 relate to the engineering and electrical goods industries as defined in Orders VII-IX of the Standard Industrial Classification, together with locomotives and railway track equipment, railway carriages and wagons, heavy commercial vehicles and wheeled tractors (parts of Order XI of the Standard Industrial Classification).

To assist in the interpretation of trends in these industries the statistics are published in seasonally adjusted form. While the method adopted in adjusting for seasonal factors removes regularly recurring influences, the seasonally adjusted series still reflects the effects of factors that do not recur regularly. Moreover, the seasonal pattern may be changing. The month to month variations are therefore kept under review and the seasonal adjustment factors are re-assessed each year as another 12 months' experience becomes available. Notwithstanding these difficulties the seasonally adjusted figures have shown themselves to be a valuable aid in interpreting trends in the complex engineering industries.

Care should be taken not to interpret changes between one month and another as necessarily indicating the underlying trend. The averages in the latest three months and in the previous three months give a more reliable guide to recent changes.

Table 1. Engineering and Electrical Goods (SIC Orders VII, VIII and IX)

Index numbers of the volume of production and exports

	Production – Seasonally adjusted				Exports
	Total	Mechanical Engineering (†)	Instrument Engineering (‡)	Electrical Engineering (§)	(‖)
	1963=100				1961=100
1963	100	100	100	100	106
1964	109	109	108	109	105
1965	113	115	120	109	111
1966	122	123	122	121	116
1967	126	123	123	129	113
1968	131	126	135	137	126
1969	137	131	147	144	140
1967 1st qtr.	123	125	119	122	123
2nd qtr.	127	123	121	127	123
3rd qtr.	126	122	126	128	103
4th qtr.	127	122	127	131	102
1968 1st qtr.	128	123	135	135	132
2nd qtr.	131	125	132	140	128
3rd qtr.	131	126	137	138	116
4th qtr.	132	129	135	137	127
1969 1st qtr.	134	127	146	142	126
2nd qtr.	137	132	151	142	141
3rd qtr.	140	132	151	149	136
4th qtr.	139	134	144	147	153
1970 1st. qtr. p	142	136	157	147	
1968 October	132	129	135	137	
November	134	130	136	138	
December	131	128	134	136	
1969 January	132	122	150	142	
February	133	128	141	138	
March	138	132	148	145	
April	135	128	153	143	
May	138	134	147	141	
June	137	133	154	141	
July	137	131	153	143	
August	139	131	151	149	
September	144	134	148	156	
October	139	132	151	148	
November	141	136	142	146	
December	136	135	130	139	
1970 January p	135	129	155	140	
February p	142	139	146	146	
March p	148	140	170	156	
April p	147	143	166	150	
Average:					
Latest 3 months	146	141	161	151	
Previous 3 months	137	133	142	141	
Percentage change	*+6*	*+6*	*+13*	*+7*	

(†) Covers minimum List Headings 331 to 349 of the Standard Industrial Classification
(‡) Covers Minimum List Headings 351 to 354 of the Standard Industrial Classification
(§) Covers Minimum List Headings 361 to 369 of the Standard Industrial Classification
(‖) Quarterly index of the value at constant (average 1961) prices of exports included in Divisions 71, 72 and 86 of the Export List. The coverage is not identical with commodities in Orders VII-IX of the Standard Industrial Classification

(*Continued on page* 1665)

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Overseas Projects Group: progress in 1969

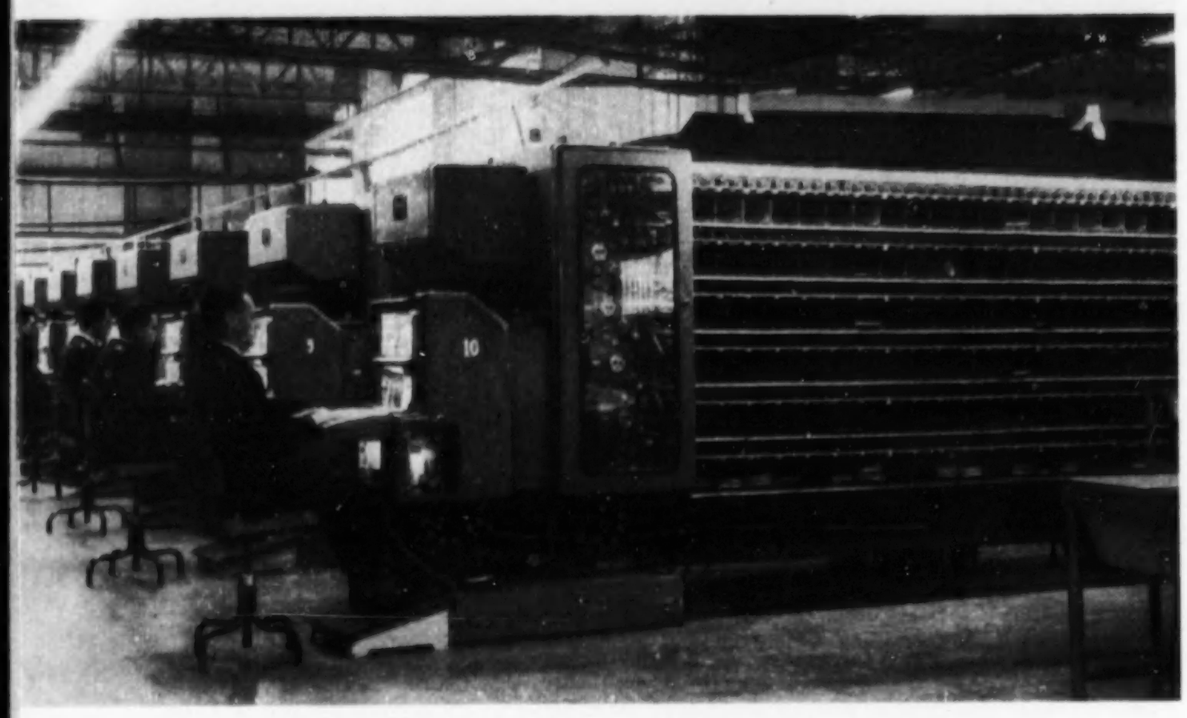
MANY points of growth for export trade – for advanced equipment, for services embodying specialized skills and for profitable transmission of industrial knowhow – lie within the field of capital projects overseas.

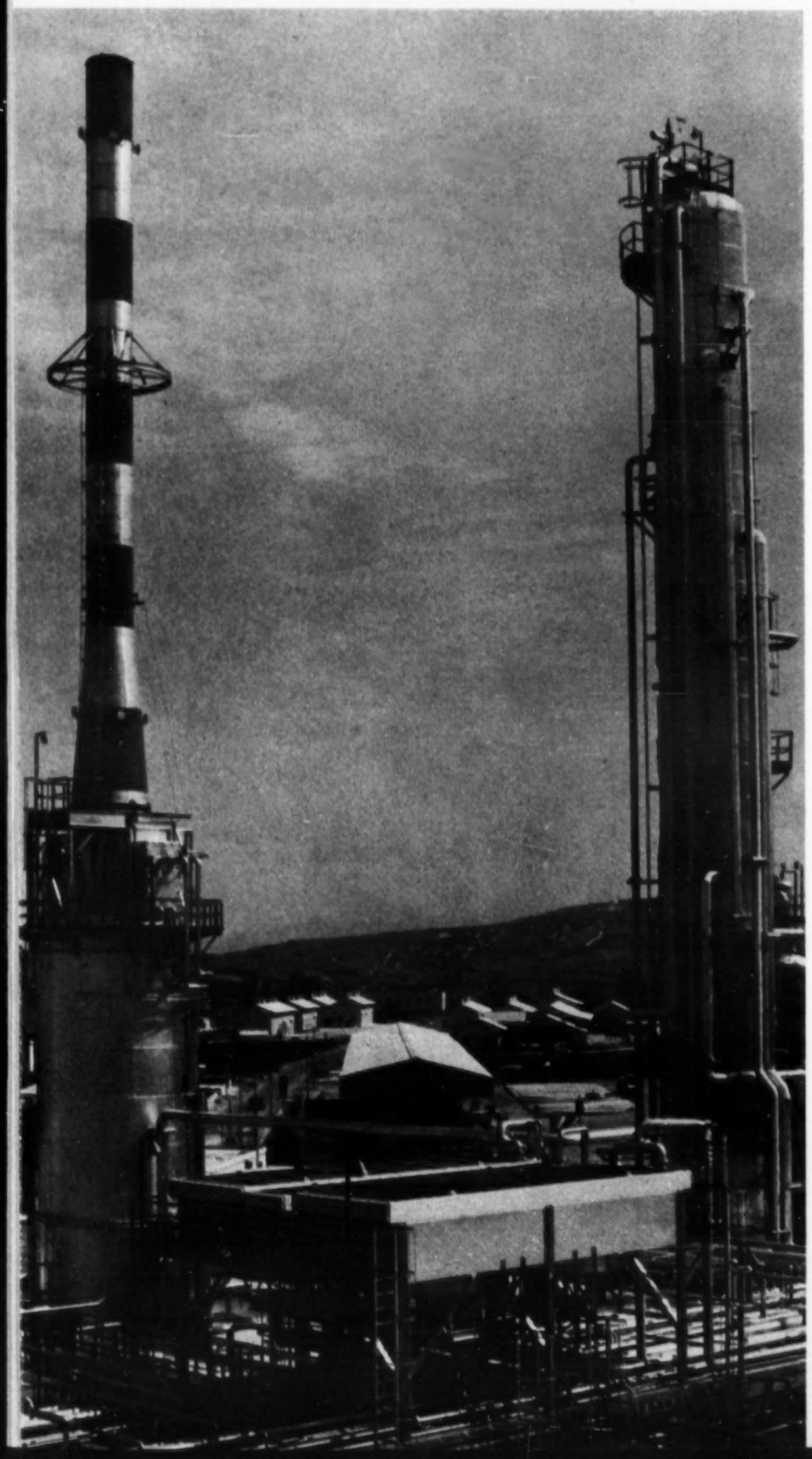
This is a vast market in money terms. Geared as it is to the pace of industrial and social development throughout the world, it seems likely to grow steadily, and to offer undiminishing scope to the professional and industrial interests concerned who can keep up with the field, both in the technological content of what they offer and in the flexibility of their techniques for getting business in markets at varying stages of development.

But the competition is fierce. Winning important contracts often depends on the co-operation of many different organizations. It was to help in this work that the Board of Trade's Overseas Projects Group (OPG) was set up in 1968.

OPG acts as a contact point, and helps to co-ordinate the activities of consultants, contractors, manufacturers and financial institutions. It also helps to finance feasibility studies which may lead to substantial exports of capital goods, and is developing arrangements for nationalized industries and other public bodies to assist British exporters to gain business from capital projects overseas. In fact OPG tries to prevent gaps in what British industry can offer for particular contracts.

Gas treating plant at Bid Boland, Southern Iran, part of the Iranian Gas Trunkline Project which Costain and Press (Overseas Services) Ltd. are constructing for the National Iranian Oil Company. Consultants are the Iranian Management and Engineering Group.





MAIN ACTIVITIES OF OPG

A first progress report on OPG appeared in the *Board of Trade Journal* of July 2, last year. During 1969 OPG's work has concentrated on four specific activities:—

(a) Contributing towards the cost of feasibility and similar studies overseas which may lead to important export orders.
(b) Seeking the help of public sector bodies where their technical and operational experience could strengthen the professional and commercial export effort.
(c) Assisting British interests in specific cases which present new or complex problems.
(d) Indexing overseas capital projects and monitoring developments on them so as to build up data which may be useful in securing future contracts.

FEASIBILITY FUND

In May, 1969, OPG was allocated an experimental fund, of £100,000 for 1969/70, to help finance feasibility studies and pre-feasibility activities on overseas projects offering attractive prospects for exports of British capital goods. The fund helps consultants, contractors and manufacturers to take initiatives up to the feasibility stage, where because of foreign low-cost competition or other financial considerations promising opportunities can often be lost for the sake of relatively small sums of money. It also enables the resources of national or local authority organizations, 'national users', to be used in similar ways to help secure contracts for Britain in cases which would not otherwise be profitable to them.

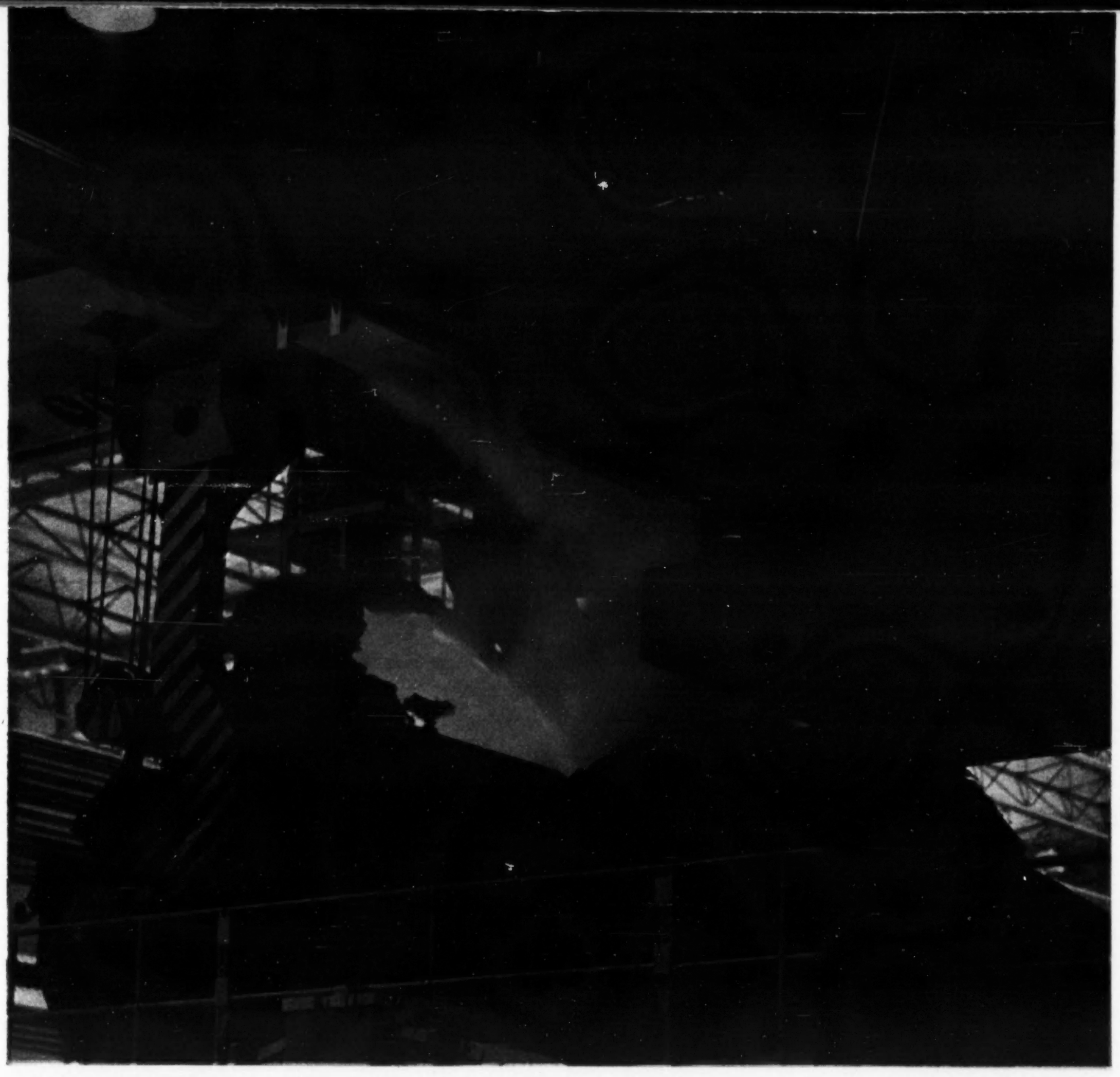
By the end of 1969 OPG had considered 31 cases for financial support put forward by consultants, industry, Diplomatic Service Posts overseas and OPG itself. Support for nine was agreed. The cost to OPG of £27,660 compared to a total project value of well over £50 million. In most cases OPG covered part of the total cost, the rest being borne by the body carrying out the study. For these projects OPG's contribution varied between £500 and £6,000. They included mining, mineral-treatment, underground railways, agricultural development and industrial plants, and covered Latin America, Africa, the Middle East, Eastern Europe and the Mediterranean. By the end of 1969 four of the approved studies or visits were in progress, one had been abandoned without expenditure being incurred and preparations for the others were in hand. Of the 22 cases that were abandoned several could be financed by other means. The rest were disqualified for a variety of reasons or were not pursued by the applicant.

The Board of Trade has made a similar provision of £100,000 for the Feasibility Fund in 1970/71 and OPG would welcome more applications. not least to test whether this experiment justifies a continuing place in the armoury of export promotion facilities. The fund is open not only to professional consultants but also to all British commercial interests who, in pursuit of exports arising from capital projects, need to offer feasibility or similar services. However costs of tendering and other normal marketing overheads are not eligible for support nor is it available where there are other sources of finance, such as the Ministry of Overseas Development's technical assistance funds. Where OPG has given assistance it is normally repaid if substantial export business has resulted.

OPG aims to deal with applications quickly and with minimum formalities: it has been possible to agree cases within a week. Details of the fund and of how to apply were circulated at the outset to all professional and commercial associations whose members were thought likely to be interested. Any person or company interested is, however, invited to obtain details direct from the Overseas Projects Group, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2466), whose officials will also be happy to advise informally whether a proposition is likely to qualify for help.

Above: A battery of Masson, Scott and Thrissell letter-sorting machines supplied to the Spanish postal authorities. The machines enable 5,000 letters per hour to be sorted into 144 destinations.

Below: Crude oil distillation unit and copper chloride sweetening unit for the Iraq Petroleum Co. Ltd., at Tripoli. Matthew Hall Engineering Ltd. were the main contractors.



Wellmann International Engineering Ltd. was one of two British companies jointly responsible for engineering of the steelmaking and rolling mill areas at the iron and steelworks of Rudnici i Zelezara at Skopje, Yugoslavia. Picture shows the charging of one of the two LD/AC vessels in the converter bay.

NATIONAL USERS

During 1969 OPG extended its working contacts with many public bodies, principally the nationalized industries, who are large-scale users of British systems and equipment and who accordingly have acquired great skill in their planning and management. This skill can not only provide British consultants, contractors and manufacturers with valuable support in their efforts to get overseas business; but deployed abroad independently, it can open up opportunities which British commercial and professional interests can follow up.

A number of these national users have long been supporting the general export effort along these lines in a variety of ways, in addition to their more traditional roles such as demonstrating domestic equipment to overseas visitors, giving informal technical advice to their counter-parts abroad, training overseas engineers, and seconding staff under Governmental technical assistance programmes. By acquiring a comprehensive knowledge of the kind of help these organisations can give, OPG has been able to pass this information on to British firms who would otherwise not be aware of all these possibilities. By working closely both with national users and industry OPG has extended the ways in which they successfully co-operate in export markets.

The following examples indicate the extent and versatility of national user support facilities, but their nature and availability inevitably vary. Shortages of skilled personnel, inescapable home priorities and the need to ensure a reasonable return on effort limit the scope of their operations.

The photographs on these pages, representing examples of British participation in major overseas projects, were obtained with the co-operation of:

The Locomotive and Allied Manufacturers Associatian of Great Britain,
The British Constructional Steelwork Association,
The British Postal Equipment Engineering Association,
The Association of British Consulting Engineers,
The British Chemical Engineering Contractors' Association,
and the firms named in the captions.

British Oxygen Company's 566-ton per day tonnage plant at Port Kembla, New South Wales.

No one can know precisely what services are going to be needed nor how great will be the demand, but OPG's experience more and more suggests that the scope will be wide and the demand strong. It suggests that many of them can in fact become a profitable activity for national users themselves and that growing co-operation with other British interests on overseas projects will make Britain an increasingly formidable competitor in this field.

Civil aviation

The Board of Trade's Directorate of Operational Services Overseas, whose main function is to give national civil aviation authorities advice and assistance with aviation ground services, telecommunications and navigational aids, visited numerous countries in the Middle East, South America, the Caribbean and Scandinavia during 1969 and put the authorities there and United Kingdom exporters in touch with each other. Valuable trade, connected with airport development, has followed. OPG's discussions with the British Airports Authority and Ministry of Public Buildings and Works have resulted in understandings on ways in which these bodies can develop the range of advice they provide for airport planning, construction and management. OPG has reached similar agreements with BOAC and BEA on how the support they give can be extended for passenger, baggage and cargo-handling projects and ones involving apron equipment.

Transport

British Rail have continued to provide technicians to assist in a major overseas railway electrification scheme and had detailed discussions with OPG which have led to the setting up of a consultancy service for operations abroad, Transportations Systems and Market Research Ltd. (Transmark). OPG has arranged with British firms to finance exploratory visits by London Transport to North America in connection with urban rail projects, an increasingly large market there. London Transport has provided short term technical advisers both there and for various urban rail projects elsewhere. It has also taken part in an overseas trade mission and received three trade missions from abroad besides working with British consultants and overseas authorities on wider transport projects. On urban road projects OPG has discussed with the Ministry of Transport and the Greater London Council the types of technical advice they could provide in support of British exporters.

Hospitals and medical equipment

Representatives of the Department of Health and Social Security visited some 20 countries in North and South America, Europe, North Africa and the Middle and Far East to discuss requirements with local health authorities. This has helped create many openings for exporters. The Department works closely with the British Hospitals Export Council and the supplying industries in connection with hospital and related projects overseas.

Education

OPG is discussing with the Departments of Education and Science and of Employment and Productivity what support they can give for school, university, technical education and similar projects abroad.

Steel plant

Discussions have been held with the British Steel Corporation about further ways of assisting plant exports. Early in 1969 the Corporation set up an organization which in close liaison with plant manufacturers is providing technical and managerial skills for running-in overseas plants.

Mining

Liaison with the National Coal Board has facilitated the provision in several instances of technical advice to British firms competing for coal mining and treatment projects.

Electric power

The Electricity Council, the Central Electricity Generating Board and the London Electricity Board have started a section to co-ordinate the advisory services they are providing overseas. Liaison between OPG, these bodies, the South of Scotland Electricity Board and the North of Scotland Hydro-electric Board have led to these organizations working with independent British consultants and advising overseas electricity authorities on operational problems. OPG has represented the Board of Trade on the Reactor Export Policy Committee, set up in mid-'69 with industrial, Atomic Energy Authority and Departmental membership to co-ordinate export effort on nuclear power projects.

Gas

In addition to liaison with plant makers on exploiting licences for processes which it has developed, the Gas Council announced in November 1969, after discussions with OPG, the formation of its International Consultancy Service which has made the expertise of the Council available to consultants and contractors concerned with overseas business.

Radio and Television

The BBC has close contact with developments in many countries where opportunities exist for sales of British equipment. OPG has discussed with the Corporation what further help can be given to exporters of television and radio systems.

Postal services

OPG has reviewed with the British Postal Consultancy Service of the Post Office Corporation how provision of their expertise can further assist exports in the field of telecommunications and mechanical postal systems. The Service has already had assignments in Europe, the Middle East and Latin America, and visits to Canada resulted in Canadian engineers coming to Britain to study how our postal mechanization systems could be applied in their cities.

BRITISH FIRMS AND CAPITAL PROJECTS OVERSEAS

Most projects present British exporters with no problems with which they are not familiar and which cannot be met from normal export promotion facilities. OPG accordingly concentrates on identifying, in the 30 or so new projects arising each week, any which seem to have novel or complex features, or on which a 'break-through' by British interests seems particularly desirable, and then asks British firms likely to be interested whether it can assist in any way, for instance by enlisting a national user facility as already described or by helping to bring together an appropriate consortium. Failure to be amongst the first to register convincing interest with the potential customer can leave British exporters at a serious, often irremediable, disadvantage against their competitors.

Other casework not initiated by OPG arises from firms seeking specialized help of various sorts, from Overseas Commercial Posts or other parts of the Government's export services for similar reasons. In all, OPG became involved in about 150 specific new projects during 1969. In some, quite briefly, e.g. by putting equipment suppliers in touch with firms undertaking the constructional work: but in many cases more continuously, e.g. by promoting an initial consultancy or outward mission and by helping to organize consortia for industrial follow-up. All cases of course are treated in commercial confidence and the following examples have accordingly to be expressed in generalized terms, particularly because in virtually all cases the contracts have not yet been awarded. They do, however, serve to illustrate the nature of the work.

Power projects

Thirty-three cases arose, mainly in Europe, Africa and the Americas. OPG was concerned with fostering joint efforts by manufacturers of complementary equipment and with discussions of the likely best tactics of bidding in the light of foreign competition.

Water and agricultural

There were ten cases, mainly in the Americas and Middle East. In two of them OPG agreed to help finance pre-feasibility studies in order to assist progress.

Social building

There were two urban development and tourism, three hospital, two educational and three postal projects. In a typical instance OPG co-ordinated the activities of British contracting and equipment interests for effective follow-up of consultancy work.

Civil engineering

There is a civil engineering element in nearly all cases in which OPG is involved but a representative example in this specific sector is three port projects in which OPG helped to bring contracting and equipment groups together.

Transport

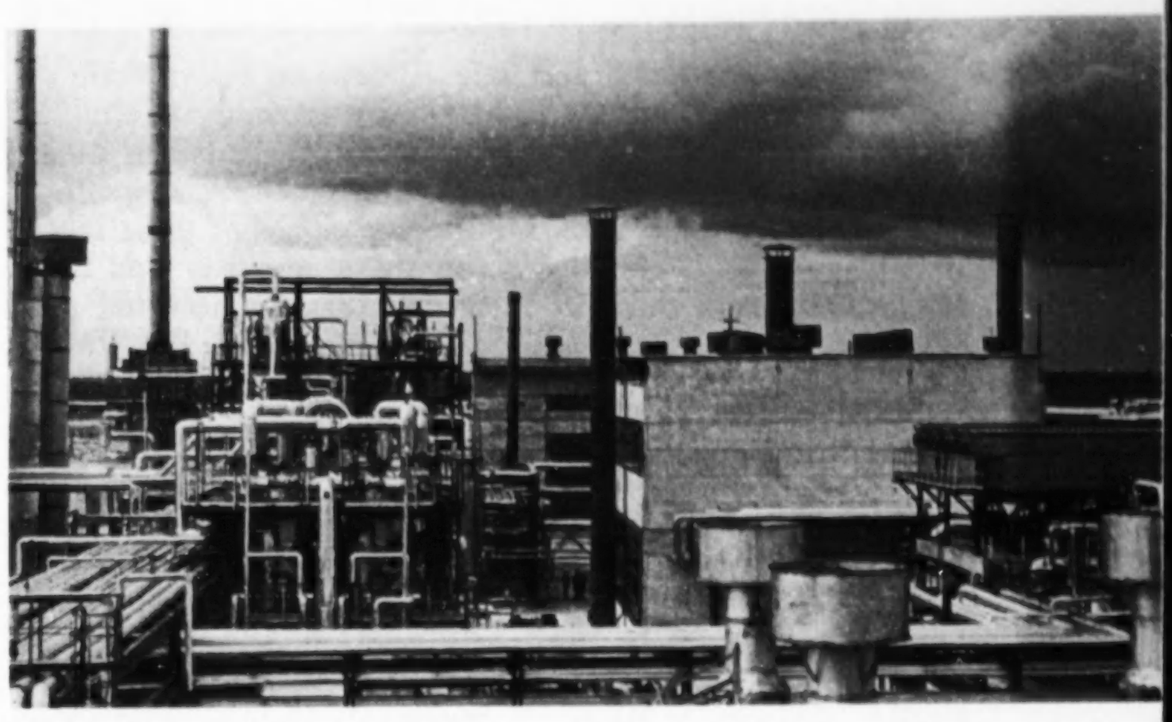
Over 40 civil airport projects arose in all parts of the world, eight urban railway projects in Latin America, North America, Europe and the Far East, and five mainline railway projects in Latin America, Europe and Africa. In many of these, OPG has been involved in the consultancy stages; and in those offering more immediate business opportunities, OPG has been concerned in helping to set up British consortia, often with the backing of merchant banks.

Telecommunications

Projects in Latin America and Middle and Far East have involved OPG in discussions with consultants and manufacturers about appropriate efforts at tackling them.

Mining

There were seven cases, mainly in the Americas. In a typical instance, OPG contributed to a feasibility study and worked with a merchant bank and industrial firms in preparing a package of finance and equipment and in enlisting specialist expertise from the public sector. Growing interest in the export potential presented by Australian mining developments led OPG to compile in March 1969 a comprehensive survey of these projects and of associated transport and community developments, copies of which went to relevant Trade Associations and other industrial bodies.



Paraxylene plant at Novopolotsk, USSR; one of two ancillary feedstock plant contracts (total value £10 million) awarded to Constructors John Brown Ltd.

Artist's impression of a suspension bridge across the Bosphorus in Turkey, linking Europe and Asia. The Cleveland Bridge and Engineering Co. Ltd. (a member of the Cementation Group) in a consortium with Hochtief AG of Germany, has won the contract worth £14 million. British consulting engineers Freeman, Fox and Partners designed the bridge.

Oil and chemicals

Eleven cases arose in Western Europe, the Americas and Far East.

Steel and other metal plant

Twenty projects spread widely around the world involved OPG in a variety of action, one example of which started with the nomination of individuals to supervise the planning of a project and went on to embrace successful consultancy studies and the organization of follow-up by industry.

Other industrial plant

Six cases of widely differing character involved OPG in discussions of tactics with various British firms.

ANALYSIS OF PROJECTS

OPG has already assembled and indexed detailed information on over 4,000 projects and this list is constantly growing. It aims to publish periodically, as at the end of this report, analytical tables based on this data to enable professional and commercial interests to detect trends and draw lessons. OPG sends copies of these tables direct to the representative bodies of these interests and welcomes suggestions from them or their members on how the presentation of this information could be made more useful. It should be remembered that this data is for analytical purposes and is not part of the Board of Trade's machinery for disseminating information about market opportunities to exporters.

Notes on the tables

In considering the tables at the end of this report, these considerations should be borne in mind:

a. They seek to exclude projects for which all or nearly all of the main contracts are virtually certain to be placed locally; the aim is to cover business which is in practice open to non-local competition. The judgments will sometimes be wrong; and the effect is to understate the volume of projects on foot in highly industrialized countries, where local interests will secure many of the main contracts but where nevertheless British exporters may be able to get many smaller orders under sub-contracts.

b. Since United Kingdom Embassies and journals tend to report cases where British exporters are successful, or are at least conspicuously involved, the volume of entries is *heavily* biased in favour of United Kingdom successes and interests. To try to rectify this even partially would entail directing excessive inquiries to industrialists and officials overseas. Nevertheless, assuming that the bias remains fairly constant over time, it should be possible to draw some valid observations from trends in the spread of British effort in relation to its main competitors. The tables should therefore be regarded as the first step in a process which will take some years to develop rather than as a precise statistical exercise in its own right.

c. Comments on the summary tables contained in last year's progress report revealed considerable interest in the reasons for British successes and failures. It has proved difficult to obtain an objective record of the facts in most cases, let alone a reliable evaluation of them; and all that can be said of the period under review is that no single factor – price, delivery date, finance, etc. – consistently affected United Kingdom performance adversely over a significant number of project sectors or markets.

In the commentary below and in the tables, the following definitions should be particularly borne in mind: a full description of the coverage of each project sector is given in the headings on the inserts of pages ix-xi. 'Civil engineering' covers all ports, docks and roads projects, and bridges and tunnels other than for railways. 'Water' includes desalination, drainage and sewerage projects. 'Social building' covers urban development, medical, educational and similar facilities. 'Transport' excludes those aspects covered in 'civil engineering' above and ships, aircraft and hovercraft, with which OPG does not deal, but embraces aviation ground services including related telecommunications projects. 'Other' covers all industrial plant projects not elsewhere specified. 'North Africa' covers Algeria, Libya, Morocco and Tunis. 'Foreign' means all countries other than the United Kingdom.

Project totals

During 1969, 2,163 new projects were recorded, bringing the total since January 1968 to 3,621 (Table 1). Of the former, over 25 per cent were 'possibilities' only, which range from tentative suggestions to cases where, though feasibility studies may have

AEI/English Electric equipped 5E1 electric locomotives double-heading a train on South African Railways.

been completed, no decision has been taken whether or when to proceed with the project itself. The incidence of these 'possibilities' is fairly even throughout all markets. For 1969 as for the cumulative total so far, 55 per cent of the number of projects recorded fell in the civil engineering, transport, social building and power sectors, with transport and telecommunications projects showing the most pronounced growth; and Western Europe, South America and 'rest of Africa' were the most numerous markets, though rivalled by Middle East and North Africa if counted together. No deductions about market growth however can yet be drawn from the figures because full figures were not recorded in 1968 for the Americas and Western Europe.

Estimates of likely cost were available for just under half – 1,006 – of projects recorded in 1969 (Table 2). 43 per cent cost under £5 million, 31 per cent between £5-20 million, and 26 per cent over £20 million. In nearly all projects sectors, there is an interesting spread of cases over each value band, though naturally with civil engineering, social building, and water and agricultural projects predominating proportionately in the lower bands and mining, 'other metal plant' and oil refinery projects proportionately in the higher ones. The value of all these projects might conservatively be put at over £10,000 million, suggesting a possible total of some £25,000 million for all 1969 projects; but the vagueness of cost estimates for projects in early stages must be remembered.

On a market/sector breakdown of the number of projects, 35 per cent of Middle East projects are in the civil engineering and social building sectors. In the 'rest of Africa' civil engineering, transport, and water and agricultural account for about half of the total, with heavy emphasis on road developments in certain of these countries. In India/Pakistan/Ceylon 35 per cent of the projects are in power and chemicals; and water and agricultural, civil engineering, power and transport account for over 50 per cent of projects elsewhere in the Far East. Civil engineering, power and transport are the dominant sectors in North, Central and South America; and also, together with water and agricultural and mining, in Australia/New Zealand. In Western Europe civil engineering, transport, social building and power account for well over half the total, whereas chemical and other industrial projects take up half in Eastern Europe.

United Kingdom share of consultancy commissions

The tables relating to consultancy (3-8, of which extracts are inserted below) do not specify markets, sectors or competitors' nationalities where any of these account, broadly, for less than 3 per cent of the total number of commissions recorded. The market 'Europe' can be taken as relating predominantly to Western Europe, with little consultancy work recorded in the Eastern half. A consultant's success is recorded by nationality only for work in countries other than his own: a success in his own country, against outside competition, is entered in the 'Local' columns.

The recorded United Kingdom share – 34 per cent – of feasibility studies is the same for 1969 as for 1968. Within this, United Kingdom consultants gained roughly half the studies recorded in civil engineering, water and agricultural, social building, chemical and telecommunications projects (Table 4). Our share of business was particularly good in the Caribbean, Far East and South America (Table 5) and was more broadly spread over all sectors and markets than the share of any other country. United States consultants appear as our leading competitors, showing particular strength in the mining, chemical and power sectors and in North/Central America, Caribbean and Australia/New Zealand markets. Continental European competition was concentrated in the civil engineering, power and transport sectors and in the Middle East, Africa and South America markets. Overall, some signs of growth appear in the total number of mining and telecommunication studies; and, whilst the developing areas of the Middle East and Africa still account for over a third of all feasibility studies, the more developed markets provide a significant volume of business. (Table 3).

The recorded United Kingdom share – 32 per cent – of post-feasibility consultancy, e.g. design sudies, organization of tendering and supervision of construction, is buttressed by a significant number of successes by United Kingdom overseas subsidiaries in many project sectors. Again, United Kingdom consultants did particularly well in civil engineering, social building, and water and agricultural projects (Table 7) and won over a third of all commissions recorded in 1969 in Middle East/North Africa, India/Pakistan/Ceylon. Far East, Australia/New Zealand and Europe (Table 8). The pattern of recorded competition from consultants of other nationalities is much the same as with feasibility studies; and, overall, signs of growth appear in the total number of post-feasibility consultancies in transport and social building (Table 6).

Contracts awarded

In 1969, 528 contracts were recorded as being awarded, relating to 426 separate projects. The contract value was known for 369 of these, totalling £2,138 million. Two-thirds of the latter, by number, were under £5 million each but accounted for only 18 per cent of the total value. Seven per cent by number were over £20 million each but accounted for 39 per cent of the total value (Table 9). The Middle East, Western Europe and 'rest of Africa' markets account for over 40 per cent of recorded contracts, by number and by value; but South America joins them in showing high figures in the over-£20 million value band. North/Central America emerges as leader in he £10-£20 million band, South America in the £5-10 million band and 'rest of Africa' in the £1-5 million band, though run close by both Middle East and Western Europe (Table 10).

A market/sector breakdown of the number of contracts both in 1969 and since January 1968 shows Middle East/North Africa still in the leading position, with a heavy concentration of water

CONSULTANCY: FEASIBILITY STUDIES YEAR 1969 (Since January 1 1968 in brackets)

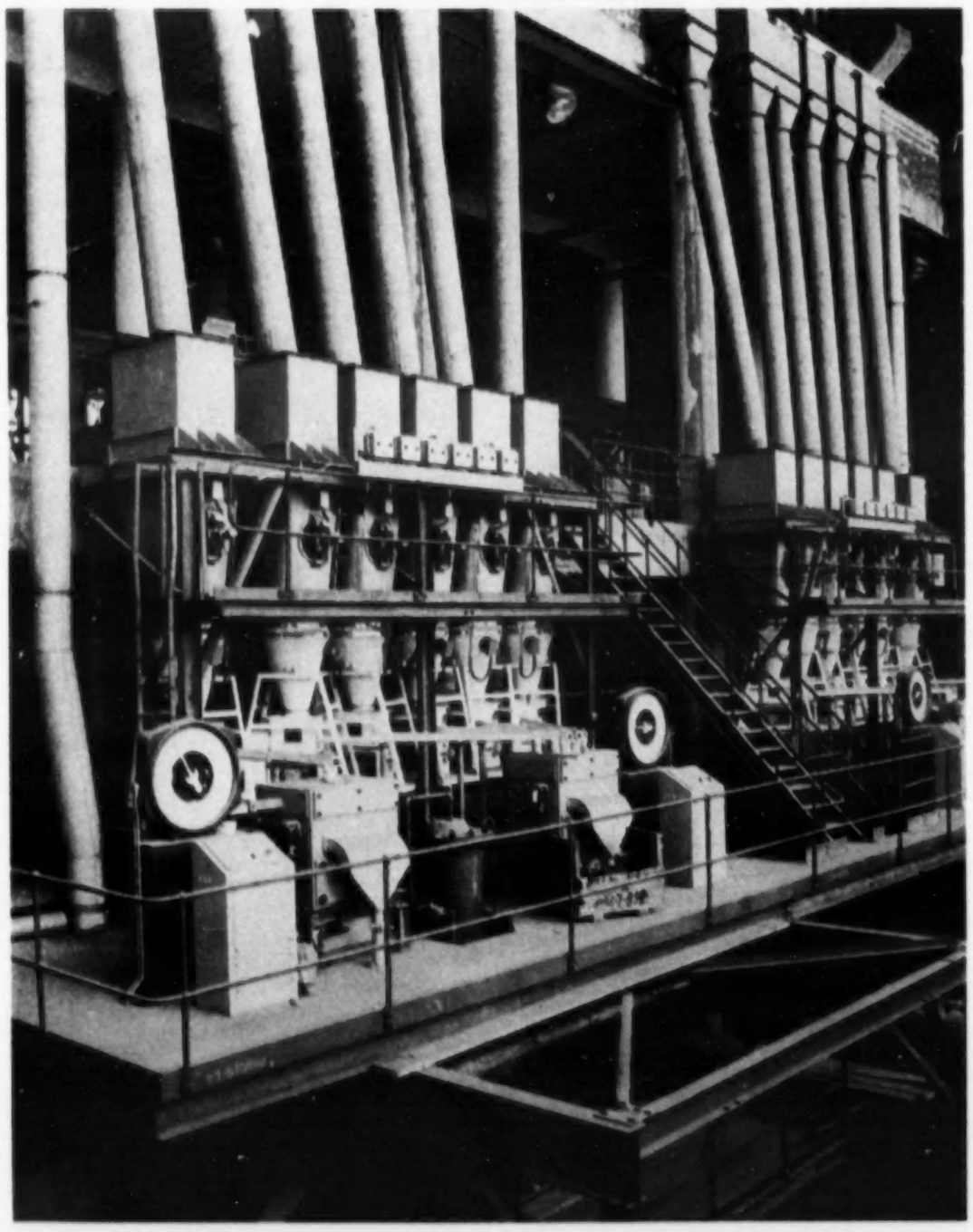
Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	Europe	Total
No. of feasibility studies:										
(a) Total	55 (124)	66 (123)	22 (27)	30 (31)	27 (29)	47 (63)	28 (31)	31 (31)	25 (36)	331 (495)
(b) United Kingdom	15 (37)	14 (37)	9 (11)	17 (18)	5 (5)	19 (24)	2 (3)	22 (22)	11 (15)	114 (172)

CONSULTANCY: POST-FEASIBILITY COMMISSIONS YEAR 1969 (Since January 1 1968 in brackets)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	Europe	Total
No. of post-feasibility studies:										
(a) Total	107 (332)	66 (227)	37 (50)	67 (48)	37 (44)	34 (46)	53 (53)	48 (50)	56 (81)	485 (931)
(b) United Kingdom	42 (151)	21 (123)	14 (18)	28 (29)	17 (23)	11 (14)	5 (5)	17 (18)	20 (29)	175 (410)

Pakwach Bridge, Uganda, built by the Mowlem Construction Co. Small picture below shows the dry dock being towed from Butiaba on Lake Albert at the start of the contract. Picture on the right shows a view of the bridge looking towards the east bank.

Below: Weighing equipment in the main process building of a tyre factory in Czechoslovakia under construction by Simon Handling Engineers Ltd.



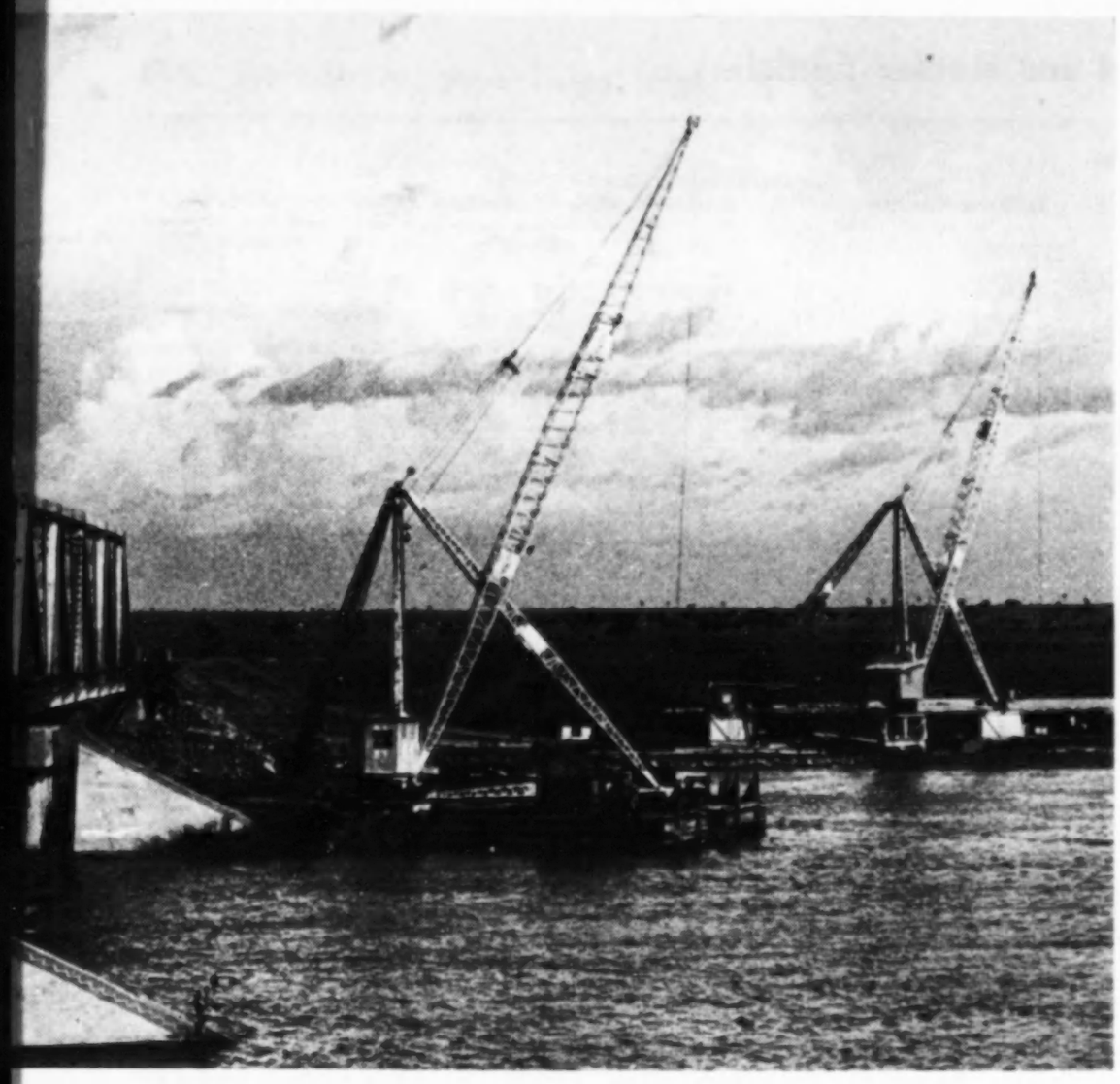
and agricutural and of power contracts, and Western Europe now taking second place. The power sector remains easily the most numerous, notably in Western Europe as well as Middle East/North Africa, with social building, water and agricultural, and civil engineering now being joined in the next largest group by chemical contracts, which are concentrated in Eastern and Western Europe and India/Pakistan/Ceylon (Table 11).

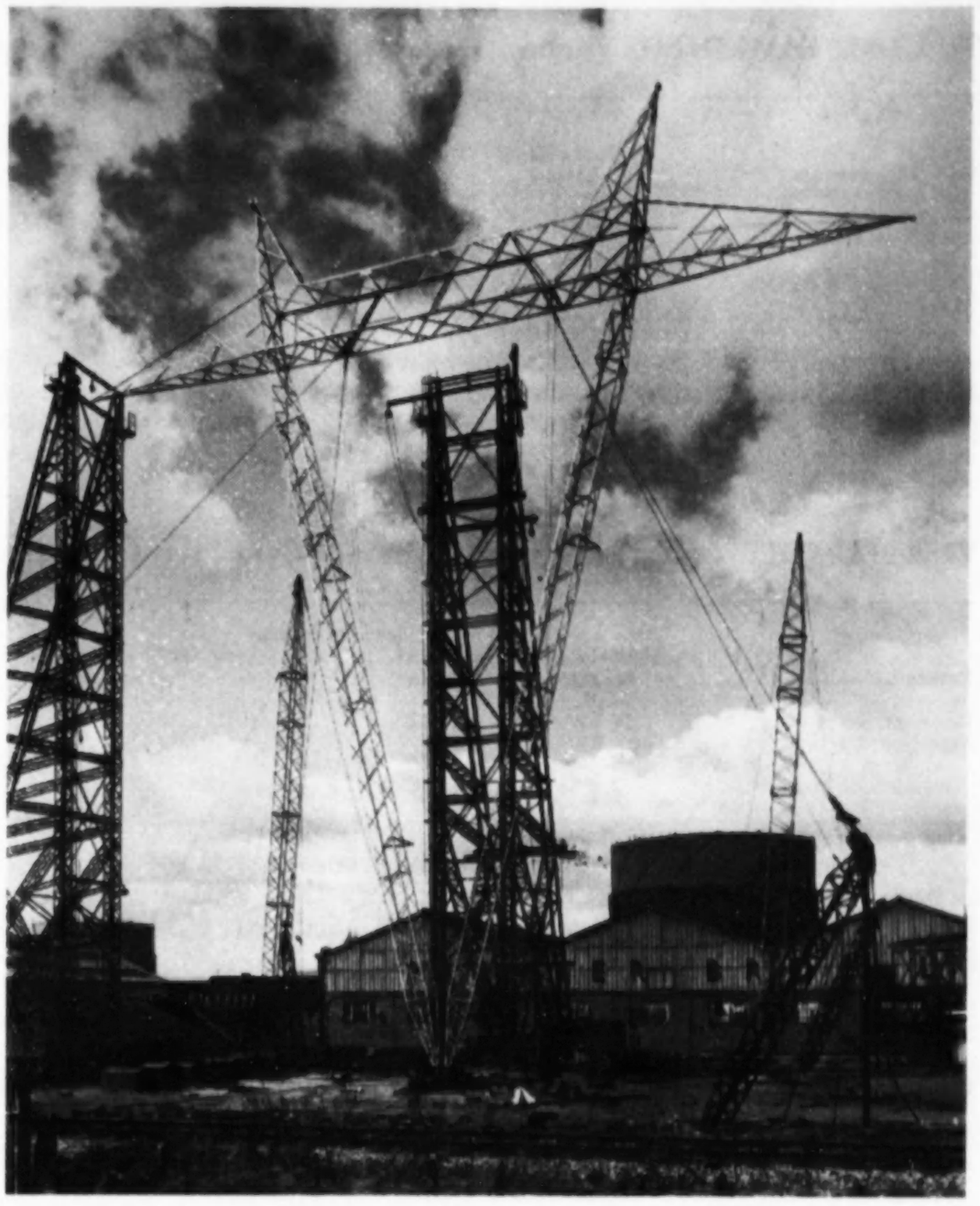
United Kingdom share of contracts

The tables relating to contract shares (12-14) again do not specify sectors or competitors' nationalities which account, broadly, for less than 3 per cent of the number of contracts recorded. Again, a contractor's success is recorded by nationality only for business in countries other than his own, a success in his own country against outside competition being entered in the "Local" columns; but contracts awarded jointly to United Kingdom and local (and also foreign) firms are shown separately.

Contracts won by the United Kingdom are, as in the consultancy fields, spread very widely over all sectors and markets by comparison with those recorded for our major competitors. The 150 United Kingdom contracts recorded in 1969 are the same percentage of the total – 28 per cent – as in 1968. But the bias mentioned above in favour of the United Kingdom in all these figures must be particularly borne in mind here. Joint United Kingdom/local or foreign, and also United Kingdom overseas subsidiaries' contracts in 1969 together come to a further 7 per cent of the recorded total. Noteworthy in the broad market spread of United Kingdom successes are the high shares of recorded business in Eastern Europe, the Caribbean, Far East and Western Europe, and the low shares in India/Pakistan/Ceylon and 'rest of Africa', though in the latter United Kingdom overseas subsidiaries' contracts were quite substantial (Tables 12 and 13) together come to a further 7 per cent.

The following insets extract from these latter two tables, sector by sector, the market pattern of contracts awarded, compared with the known amount of projects business on hand, and the known number of these contracts which were awarded to United Kingdom interests. For this purpose 'United Kingdom' includes contracts awarded jointly to United Kingdom and local or foreign contractors and to overseas subsidiaries of United Kingdom firms. In each inset, the first figures are for 1969 – those in brackets are cumulative from January 1, 1968.





Right: The first of the guyed towers produced by Painter Bros. Ltd., Hereford, a member of the BICC Group, for the £22 million contract awarded by Hidroelectrica Norpatagonia SA (Hidronor) to the Anglo-Argentinian Power Construction Consortium, of which Painter Bros. is a member.

CIVIL ENGINEERING (ports, docks, roads, and bridges and tunnels other than for railways)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	42 (139)	56 (167)	18 (24)	33 (34)	27 (31)	45 (67)	33 (33)	19 (19)	52 (88)	2 (17)	327 (619)
No. of contracts:											
(a) Total	10 (26)	5 (18)	8 (9)	4 (4)	7 (7)	5 (7)	2 (2)	2 (2)	5 (6)	— (1)	48 (82)
(b) United Kingdom	1 (4)	— (2)	—	3 (3)	3 (3)	4 (4)	—	2 (2)	3 (3)	—	16 (21)

This sector is the second largest in terms of numbers of contracts recorded since January 1968; and the concentration of business in Middle East and Africa is clear. It is in these markets that French and Italian competition is strong generally, much of it bearing on this particular sector which also reflects strong competition in North Africa from Eastern European (almost entirely non-USSR) contractors. Nevertheless the proportion of United Kingdom successes recorded in most of the other markets results in a good outturn for the sector as a whole.

POWER (hydro-electric with related dam construction, nuclear, gas and fossil fuel)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	27 (87)	30 (82)	8 (31)	30 (31)	14 (29)	41 (72)	35 (37)	4 (5)	44 (70)	2 (21)	235 (465)
No. of contracts:											
(a) Total	19 (40)	17 (26)	4 (10)	12 (12)	4 (9)	12 (15)	10 (10)	1 (1)	32 (35)	2 (4)	113 (162)
(b) United Kingdom	6 (15)	7 (8)	1 (1)	—	4 (5)	4 (4)	4 (4)	1 (1)	7 (8)	—	34 (46)

This sector is easily the largest in terms of numbers of contracts but comes second to chemicals in terms of aggregate contract values. It too, whilst showing a good United Kingdom performance overall, reflects French and Italian competition, particularly in Middle East and Africa, and also German particularly in Middle East and South America.

WATER (including de-salination, drainage and sewerage) AND AGRICULTURAL

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	30 (118)	37 (85)	7 (23)	42 (44)	12 (28)	21 (36)	18 (22)	25 (27)	24 (35)	1 (5)	217 (423)
No. of contracts:											
(a) Total	27 (47)	3 (5)	— (2)	6 (6)	1 (2)	2 (2)	—	7 (8)	2 (3)	1 (1)	49 (76)
(b) United Kingdom	2 (6)	1 (1)	—	2 (2)	—	—	—	3 (3)	1 (1)	1 (1)	10 (14)

This is the third largest sector in terms of numbers of contracts but comes low in the list of aggregate contract values. There is a heavy concentration of business in Middle East/North Africa. It too is a sector reflecting strong German competition, again in the Middle East market particularly.

SOCIAL BUILDING (urban development, medical, educational and similar facilities)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	58 (128)	28 (78)	5 (5)	10 (16)	12 (15)	19 (32)	23 (23)	63 (64)	68 (82)	11 (13)	297 (456)
No. of contracts:											
(a) Total	14 (26)	17 (21)	—	1 (1)	2 (2)	2 (2)	5 (5)	10 (10)	7 (7)	—	58 (74)
(b) United Kingdom	3 (5)	6 (6)	—	—	1 (1)	1 (1)	2 (2)	6 (6)	3 (3)	—	22 (24)

This is the next largest sector by contract numbers, though also well down in aggregate contract values. Despite the concentration of contracts in Middle East/Africa, where the proportion of United Kingdom successes was high, there is a good spread of projects through all markets. As Table 12 shows, however, this is a sector in which, predictably, successes by 'local' contractors are frequent.

TRANSPORT (aviation ground services, railways, urban transit)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	37 (88)	42 (69)	5 (7)	30 (30)	28 (32)	36 (44)	54 (56)	19 (19)	71 (80)	3 (8)	325 (433)
No. of contracts:											
(a) Total	8 (13)	8 (17)	— (1)	4 (4)	4 (4)	2 (3)	2 (2)	3 (3)	4 (4)	— (1)	35 (52)
(b) United Kingdom	2 (5)	2 (5)	—	2 (2)	1 (1)	—	—	1 (1)	—	—	8 (14)

This sector comes second in numbers of contracts in the over-£20 million band; but it is also one in which the proportion of 'local' successes is high, though probably in respect of contracts in the lower-value bands. The concentration of contracts in Middle East and Africa is clear; but the spread of projects over all markets reflects the growth character of this sector which was mentioned earlier in respect of post-feasibility consultancy commissions.

CHEMICAL (including petrochemical and fertilizer plants)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	19 (42)	4 (13)	20 (33)	12 (12)	3 (3)	29 (35)	11 (11)	1 (1)	20 (23)	21 (51)	140 (224)
No. of contracts:											
(a) Total	5 (11)	3 (6)	8 (9)	5 (5)	2 (2)	6 (8)	4 (4)	1 (1)	9 (9)	10 (15)	53 (70)
(b) United Kingdom	1 (2)	2 (2)	—	4 (4)	—	2 (2)	2 (2)	—	6 (6)	6 (11)	23 29)

This sector is by far the largest in terms of aggregate value of contracts placed, and is also the largest in terms of number and value of contracts in the over-£20 million band. The recorded proportion of United Kingdom successes is very high, not least in Western and Eastern Europe where much of the business is concentrated. Japanese competition is evident in this sector, particularly in India/Pakistan/Ceylon and Australia/New Zealand, and also United States competition primarily in the Americas and Middle East.

TELECOMMUNICATIONS (telephones, radio-satellites, other radio communications other than aeronautical, television)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	31 (62)	16 (24)	6 (8)	14 (18)	8 (9)	23 (25)	10 (11)	6 (9)	14 (20)	1 (4)	129 (190)
No. of contracts:											
(a) Total	9 (13)	1 (6)	2 (2)	2 (5)	5 (5)	9 (10)	2 (3)	4 (4)	6 (6)	1 (1)	41 (55)
(b) United Kingdom	4 (6)	1 (4)	—	2 (5)	1 (1)	3 (4)	— (1)	3 (3)	4 (4)	1 (1)	19 (29)

Noted earlier as a growth point in feasibility commissions, this sector shows a very high proportion of recorded United Kingdom successes spread over most markets; again, Japanese competition is evident in India/Pakistan/Ceylon and Australia/New Zealand.

MINING

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	5 (21)	8 (24)	7 (10)	1 (1)	22 (23)	15 (17)	4 (5)	—	5 (6)	1 (5)	68 (112)
No. of contracts:											
(a) Total	— (1)	3 (7)	— (1)	1 (1)	5 (5)	2 (2)	— (1)	—	—	—	11 (18)
(b) United Kingdom		2 (3)	— (1)	1 (1)	1 (1)					—	4 (6)

This sector shows the highest proportion of projects in the over-£20 million value band and, as earlier noted, shows growth in the number of feasibility commissions awarded. As however the recorded number of contracts in the period under review is the smallest for any sector, and as the values of only three of these are known, no worthwhile conclusions can yet be drawn about the pattern of competition. The concentration of recorded contracts in Australia/New Zealand is nevertheless clear.

OIL (refineries, pipe lines, rigs)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	22 (44)	6 (12)	1 (1)	2 (2)	5 (5)	9 (18)	12 (12)	1 (1)	12 (16)	7 (13)	77 (124)
No. of contracts:											
(a) Total	6 (10)	1 (2)	—	1 (1)	1 (1)	3 (4)	3 (3)	—	3 (3)		18 (24)
(b) United Kingdom	2 (4)					3 (4)	1 (1)		2 (2)	—	8 (11)

The third largest in terms of numbers of contracts in the over-£20 million value band, this sector shows a high proportion of recorded United Kingdom successes. Despite the concentration of contracts in Middle East/North Africa, there are many projects outstanding in the Americas and Europe; but United States competition is evident in this sector and in the first of these two markets.

STEEL PLANT

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	1 (10)	11 (17)	1 (5)	5 (5)	5 (6)	10 (12)	9 (12)	1 (1)	15 (17)	3 (7)	61 (92)
No. of contracts:											
(a) Total	2 (8)	7 (7)	—	—	3 (4)	4 (4)	2 (3)	—	19 (19)	4 (4)	41 (49)
(b) United Kingdom	— (2)	2 (2)			1 (1)	3 (3)	1 (1)		10 (10)	3 (3)	20 (22)

This sector also ranks high in projects in the over-£20 million value band; and the concentration of business in Western Europe is clear though with many projects outstanding in the Americas and 'rest of Africa'. The proportion of recorded United Kingdom successes is very high, showing a marked increase in 1969 over 1968.

OTHER METAL PLANT (aluminium, copper, zinc, etc.)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	8 (16)	3 (7)	16 (21)	4 (5)	7 (8)	12 (14)	11 (12)	4 (4)	8 (12)	4 (16)	77 (115)
No. of contracts:											
(a) Total	4 (4)	—	2 (3)	2 (2)	—	1 (1)	4 (4)	—	1 (1)	2 (8)	16 (23)
(b) United Kingdom	—		— (2)	1 (1)		—	1 (1)	—		2 (4)	4 (8)

A high proportion of projects in this sector is in the over-£20 million value band; but, despite the spread of projects over all markets, the recorded number of contracts in the period under review is too small and scattered to enable conclusions to be drawn. It is however a sector in which German competition is evident.

OTHER INDUSTRIAL PLANT (including pulp, paper and board)

Totals known to OPG	Middle East/ N. Africa	Rest of Africa	India/ Pakistan/ Ceylon	Far East	Australia/ New Zealand	S. America	N./Central America	Caribbean	W. Europe	E. Europe	Total
No. of projects	44 (99)	31 (61)	17 (24)	25 (25)	10 (10)	22 (28)	23 (24)	4 (4)	23 (31)	11 (62)	210 (368)
No. of contracts:											
(a) Total	8 (17)	10 (10)	1 (3)	5 (5)	—	5 (6)	7 (7)	2 (2)	2 (2)	5 (12)	45 (64)
(b) United Kingdom	3 (4)	6 (6)	1 (3)	5 (5)	—	1 (2)	3 (3)	1 (1)	1 (1)	1 (6)	22 (31)

Although Middle East/Africa account for much of the business, this is a sector in which Eastern Europe also features as a substantial market. The recorded United Kingdom successes are a very high proportion of total contracts known and are well spread over virtually all markets.

Value of United Kingdom share

The total value of the 125 United Kingdom contracts in 1969 for which figures were recorded was £505 million – 24 per cent of the world total recorded; and joint United Kingdom/local or foreign contracts amounted to a further £67 million and United Kingdom overseas subsidiaries' contracts to £52 million (Table 14). 72 per cent of United Kingdom contracts fell in the below-£5 million bands, yielding 27 per cent of the total value. Ten per cent were in the over-£10 million bands, yielding 45 per cent of the total value. Whereas the 1968 records identified only one United Kingdom contract over £10 million, 1969 shows 13 of these, 21 per cent of the world total for these higher value bands.

The total value in 1969 of the 150 contracts awarded to foreign competitors for which figures were recorded is £1,130 million. The leader amongst these in value terms is Eastern Europe, due to a relatively small number of very high value contracts (mainly to the USSR). The United States is next, with half its contract values falling in the £10-20 million band, followed by France with a similar concentration in that band. Germany and Japan come next, the former showing particularly high figures in the £1-5 million band, the latter fairly evenly spread over all bands above £1 million.

CONCLUSIONS

As already mentioned, this first attempt at detailed analyses provides no basis for drawing firm conclusions: two or three more years' figures are needed for detecting trends or significant features. But within its limitations the data does support the pointers suggested in OPG's previous report, in the following ways.

The share of projects business which arises from contracts of high individual values illustrates the growing size and complexity of such business and the importance of being able quickly to

mount effective consortia to tackle it. These often need also to provide the necessary financial arrangements. United Kingdom performance in high value projects is not bad, but is not as good as in lower value ones.

The wide market and sector spread of United Kingdom successes provides insurance against unpredictable variations in future opportunities. As with other classes of export business, dependence on a narrow range of traditional markets or goods carries dangers; and the openings for projects business in even the most developed markets seems substantial.

There is however increasing need to work in association with local interests, as more countries develop expertise and want an increasing share of their own project business. Such association needs planning in advance if United Kingdom firms are to establish the best local contacts and thus be able to move effectively in the early stages of business.

Nevertheless, this should not mean that a comprehensive 'design and construct' capability on the part of United Kingdom contractors is a wasting asset, since it should be possible for it to include a degree of local contribution. Britain is highly competitive in many project sectors where it has this type of capability, and there are other sectors where it could perhaps be deve'oped further.

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TABLE 1. PROJECTS RECORDED: ANALYSIS BY MARKET AND SECTOR FOR 1969 (Since January 1 1968 in brackets)

	Civil engineering	Power	Water and agricultural	Social building	Transport	Chemicals	Telecommunications	Mining
Middle East	38 (115)	24 (65)	22 (85)	50 (100)	26 (69)	11 (23)	26 (52)	5 (14)
N. Africa	4 (24)	3 (22)	8 (33)	8 (28)	11 (19)	8 (19)	5 (10)	— (7)
Rest of Africa	56 (167)	30 (82)	37 (85)	28 (78)	42 (69)	4 (13)	16 (24)	8 (24)
India/Pakistan/Ceylon	18 (24)	8 (31)	7 (23)	5 (5)	5 (7)	20 (33)	6 (8)	7 (10)
Far East	33 (34)	30 (31)	42 (44)	10 (16)	30 (30)	12 (12)	14 (18)	1 (1)
Australia/New Zealand	27 (31)	14 (29)	12 (28)	12 (15)	28 (32)	3 (3)	8 (9)	22 (23)
S. America	45 (67)	41 (72)	21 (36)	19 (32)	36 (44)	29 (35)	23 (25)	15 (17)
N./Central America	33 (33)	35 (37)	18 (22)	23 (23)	54 (56)	11 (11)	10 (11)	4 (5)
Caribbean	19 (19)	4 (5)	25 (27)	63 (64)	19 (19)	1 (1)	6 (9)	—
W. Europe	52 (88)	44 (70)	24 (35)	68 (82)	71 (80)	20 (23)	14 (20)	5 (6)
E. Europe	2 (17)	2 (21)	1 (5)	11 (13)	3 (8)	21 (51)	1 (4)	1 (5)
Total	327 (619)	235 (455)	217 (423)	297 (456)	325 (433)	140 (224)	129 (190)	68 (112)
Percentage of Total	*15 (17)*	*11 (13)*	*10 (12)*	*14 (13)*	*15 (12)*	*6 (6)*	*6 (5)*	*3 (3)*

	Oil	Steel	Other metal	Paper	Other	Total	% of total
Middle East	14 (31)	1 (8)	2 (6)	2 (6)	28 (61)	249 (635)	*12 (18)*
N. Africa	8 (13)	— (2)	6 (10)	3 (6)	11 (26)	75 (219)	*3 (6)*
Rest of Africa	6 (12)	11 (17)	3 (7)	2 (7)	29 (54)	272 (639)	*13 (18)*
India/Pakistan/Ceylon	1 (1)	1 (5)	16 (21)	3 (3)	14 (21)	111 (192)	*5 (5)*
Far East	2 (2)	5 (5)	4 (5)	4 (4)	21 (21)	208 (223)	*10 (6)*
Australia/New Zealand	5 (5)	5 (6)	7 (8)	3 (3)	7 (7)	153 (199)	*7 (6)*
S. America	9 (18)	10 (12)	12 (14)	5 (6)	17 (22)	282 (400)	*13 (11)*
N./Central America	12 (12)	9 (12)	11 (12)	10 (11)	13 (13)	243 (258)	*11 (7)*
Caribbean	1 (1)	1 (1)	4 (4)	1 (1)	3 (3)	147 (154)	*7 (4)*
W. Europe	12 (16)	15 (17)	8 (12)	4 (7)	19 (24)	356 (480)	*16 (13)*
E. Europe	7 (13)	3 (7)	4 (16)	— (4)	11 (58)	67 (222)	*3 (6)*
Total	77 (124)	61 (92)	77 (115)	37 (58)	173 (310)	2,163 (3,621)	
Percentage of Total	*3 (3)*	*3 (3)*	*4 (3)*	*2 (2)*	*8 (8)*		*100*

TABLE 2. ESTIMATED PROJECT VALUES WHERE KNOWN: ANALYSIS BY SECTOR FOR 1969

	Project value bands No.					Total No. of projects for which value is known	% of total	No. of projects for which value not known	Total No. of projects	% of total
	Under £3m.	£3–5m.	£5–10m.	£10–20m.	Over £20m.					
Civil engineering	50	12	28	18	26	134	14	193	327	*15*
Power	19	13	16	22	41	111	11	124	235	*11*
Water and agricultural	47	12	23	11	21	114	11	103	217	*10*
Social building	61	24	18	14	7	124	12	173	297	*14*
Transport	44	19	24	18	52	157	16	168	325	*15*
Chemicals	11	9	13	19	24	76	8	64	140	6
Telecommunications	21	11	6	4	9	51	5	78	129	6
Mining	1	3	—	3	23	30	3	38	68	*3*
Oil	1	2	8	8	15	34	3	43	77	*3*
Steel	6	3	8	7	16	40	4	21	61	*3*
Other metal	3	2	5	5	19	34	3	43	77	*4*
Paper	5	3	3	5	7	23	2	14	37	*2*
Other	39	14	14	8	3	78	8	95	173	*8*
Total	308	127	165	142	263	1,006		1,157	2,163	
Percentage of total	*31*	*12*	*17*	*14*	*26*		*100*			*100*

This ammonia plant was built by Simon-Carves Chemical Engineering Ltd. (Sim-Chem) for Chemokomplex, Hungary. It produces 420 metric tons a day from natural gas using the Haldor Topsoe process.

TABLE 3. FEASIBILITY STUDIES - CONSULTANTS: ANALYSIS BY MARKET AND SECTOR FOR 1969 (Since January 1 1968 in brackets)

	Civil engineering	Power	Water and agricultural	Social building	Transport	Chemicals	Telecommunications	Mining	Steel	Other metal	Other	Total	% of total
Middle East/N. Africa	4 (11)	4 (16)	8 (21)	4 (10)	12 (19)	3 (5)	7 (10)	2 (6)	1 (3)	2 (4)	8 (19)	55 (124)	*17 (25)*
Rest of Africa	4 (23)	16 (32)	19 (20)	—	9 (20)	— (1)	2 (2)	5 (7)	3 (5)	—	8 (13)	66 (123)	*20 (25)*
India/Pakistan/Ceylon	5 (6)	1 (2)	8 (9)	—	2 (2)	— (1)	—	3 (3)	1 (2)	2 (2)	—	22 (27)	*7 (5)*
Far East	7 (7)	4 (4)	5 (6)	1 (1)	3 (3)	—	4 (4)	—	2 (2)	2 (2)	2 (2)	30 (31)	*9 (6)*
Australia/New Zealand	3 (3)	2 (3)	2 (3)	—	4 (4)	—	—	9 (9)	2 (2)	2 (2)	3 (3)	27 (29)	*8 (6)*
S. America	8 (9)	7 (11)	9 (14)	1 (1)	7 (11)	4 (4)	—	9 (9)	—	2 (2)	— (2)	47 (63)	*14 (13)*
N./Central America	3 (4)	3 (3)	5 (5)	—	9 (9)	—	—	2 (2)	2 (2)	2 (2)	2 (4)	28 (31)	*8 (6)*
Caribbean	7 (7)	—	12 (12)	4 (4)	8 (8)	—	—	—	—	—	—	31 (31)	*9 (6)*
Europe	6 (8)	2 (5)	1 (4)	5 (5)	4 (6)	2 (2)	1 (1)	1 (1)	1 (1)	1 (2)	1 (1)	25 (36)	*8 (8)*
Total	47 (78)	39 (76)	69 (94)	15 (21)	58 (82)	9 (13)	14 (17)	31 (37)	12 (17)	13 (16)	24 (44)	331 (495)	
Percentage of total	*14 (16)*	*12 (15)*	*21 (19)*	*4 (4)*	*18 (17)*	*3 (3)*	*4 (3)*	*9 (7)*	*4 (3)*	*4 (3)*	*7 (10)*		*100*

TABLE 4. FEASIBILITY STUDIES - CONSULTANTS: ANALYSIS BY SECTOR AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	French	German	Italian	USA	Other foreign	Local	Total	% of total
Civil engineering	24 (35)	3 (7)	2 (8)	—	5 (11)	3 (6)	10 (11)	47 (78)	*14 (16)*
Power	4 (13)	3 (6)	1 (4)	4 (4)	9 (17)	10 (22)	8 (10)	39 (76)	*12 (15)*
Water and agricultural	32 (49)	5 (6)	3 (4)	3 (3)	9 (12)	10 (12)	7 (8)	69 (94)	*21 (19)*
Social building	9 (11)	1 (1)	—	1 (1)	1 (3)	1 (2)	2 (3)	15 (21)	*4 (4)*
Transport	14 (22)	4 (7)	2 (4)	2 (2)	10 (15)	11 (17)	15 (15)	58 (82)	*18 (17)*
Chemicals	4 (5)	1 (1)	— (1)	1 (1)	2 (2)	—	1 (3)	9 (13)	*3 (3)*
Telecommunications	7 (8)	— (1)	—	—	2 (3)	5 (5)	—	14 (17)	*4 (3)*
Mining	6 (8)	1 (2)	4 (4)	—	10 (13)	4 (4)	6 (6)	31 (37)	*9 (7)*
Steel	3 (5)	1 (1)	1 (1)	—	2 (2)	3 (6)	2 (2)	12 (17)	*4 (3)*
Other metal	4 (4)	—	—	1 (2)	2 (3)	2 (2)	4 (5)	13 (16)	*4 (3)*
Other	7 (12)	— (1)	2 (3)	2 (3)	3 (7)	5 (7)	5 (11)	24 (44)	*7 (10)*
Total	114 (172)	19 (33)	15 (29)	14 (16)	55 (88)	54 (83)	60 (74)	331 (495)	
Percentage of total	*34 (35)*	*6 (7)*	*5 (6)*	*4 (3)*	*17 (18)*	*16 (16)*	*18 (15)*		*100*

TABLE 5. FEASIBILITY STUDIES - CONSULTANTS: ANALYSIS BY MARKET AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	French	German	Italian	USA	Other foreign	Local	Total	% of total
Middle East/N. Africa	15 (37)	6 (14)	3 (6)	3 (5)	8 (25)	15 (27)	5 (10)	55 (124)	*17 (25)*
Rest of Africa	14 (37)	8 (14)	3 (11)	7 (7)	7 (15)	21 (30)	6 (9)	66 (123)	*20 (25)*
India/Pakistan/Ceylon	9 (11)	—	—	—	5 (6)	3 (4)	5 (6)	22 (27)	*7 (5)*
Far East	17 (18)	—	1 (1)	—	7 (7)	4 (4)	1 (1)	30 (31)	*9 (6)*
Australia/New Zealand	5 (5)	—	—	—	7 (9)	1 (1)	14 (14)	27 (29)	*8 (6)*
S. America	19 (24)	5 (5)	5 (8)	2 (2)	5 (10)	4 (5)	7 (9)	47 (63)	*14 (13)*
N./Central America	2 (3)	—	2 (2)	—	10 (10)	1 (3)	13 (13)	28 (31)	*8 (6)*
Caribbean	22 (22)	—	—	—	3 (3)	3 (3)	3 (3)	31 (31)	*9 (6)*
Europe	11 (15)	—	1 (1)	2 (2)	3 (3)	2 (6)	6 (9)	25 (36)	*8 (8)*
Total	114 (172)	19 (33)	15 (29)	14 (16)	55 (88)	54 (83)	60 (74)	331 (495)	
Percentage of total	*34 (35)*	*6 (7)*	*5 (6)*	*4 (3)*	*17 (18)*	*16 (16)*	*18 (15)*		*100*

TABLE 6. POST FEASIBILITY - CONSULTANTS: ANALYSIS BY MARKET AND SECTOR FOR 1969 (Since January 1 1968 in brackets)

	Civil engineering	Power	Water & agricultural	Social building	Transport	Chemicals	Telecommunications	Mining	Steel	Other metal	Other	Total	% of total
Middle East/N. Africa	12 (54)	11 (53)	16 (71)	21 (48)	19 (33)	2 (9)	6 (19)	1 (7)	— (4)	2 (2)	17 (32)	107 (332)	*22 (36)*
Rest of Africa	26 (87)	10 (39)	12 (36)	8 (27)	4 (13)	— (2)	1 (3)	1 (10)	1 (1)	1 (3)	2 (6)	66 (227)	*13 (24)*
India/Pakistan/Ceylon	13 (14)	7 (12)	2 (5)	2 (2)	3 (4)	3 (3)	—	2 (4)	—	2 (2)	3 (4)	37 (50)	*7 (5)*
Far East	10 (10)	13 (13)	15 (16)	1 (1)	7 (7)	—	—	—	—	—	1 (1)	47 (48)	*10 (5)*
Australia/New Zealand	10 (10)	2 (7)	3 (4)	4 (4)	7 (7)	1 (1)	1 (1)	8 (8)	— (1)	—	1 (1)	37 (44)	*8 (5)*
S. America	8 (10)	9 (13)	4 (5)	2 (2)	3 (4)	3 (4)	—	1 (2)	1 (2)	1 (2)	2 (2)	34 (46)	*7 (5)*
N./Central America	5 (5)	12 (12)	1 (1)	6 (6)	14 (14)	2 (2)	4 (4)	—	2 (2)	3 (3)	4 (4)	53 (53)	*11 (6)*
Caribbean	7 (7)	1 (1)	6 (8)	24 (24)	4 (4)	1 (1)	2 (2)	—	—	3 (3)	—	48 (50)	*10 (5)*
Europe	7 (11)	11 (18)	7 (12)	16 (18)	2 (3)	4 (6)	—	5 (5)	— (1)	1 (1)	3 (6)	56 (81)	*12 (9)*
Total	98 (208)	76 (168)	66 (158)	84 (132)	63 (89)	16 (28)	14 (29)	18 (36)	4 (11)	13 (16)	33 (56)	485 (931)	
Percentage of total	*20 (22)*	*16 (18)*	*13 (17)*	*17 (14)*	*13 (10)*	*3 (3)*	*3 (3)*	*4 (4)*	*1 (1)*	*3 (2)*	*7 (6)*		*100*

TABLE 7. POST FEASIBILITY - CONSULTANTS: ANALYSIS BY SECTOR AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	UK overseas subsidiary	French	German	Italian	USA	Other foreign	Local	Total	% of total
Civil engineering	40 (101)	2 (12)	7 (11)	5 (6)	3 (8)	10 (15)	12 (22)	19 (33)	98 (208)	*20 (22)*
Power	22 (69)	1 (2)	3 (8)	2 (4)	1 (3)	15 (22)	19 (34)	13 (26)	76 (168)	*16 (18)*
Water and agricultural	22 (78)	7 (7)	4 (8)	2 (5)	3 (8)	4 (10)	7 (18)	17 (24)	66 (158)	*13 (17)*
Social building	32 (55)	4 (4)	1 (1)	— (1)	1 (3)	7 (9)	9 (18)	30 (41)	84 (132)	*17 (14)*
Transport	15 (26)	4 (5)	7 (8)	2 (3)	2 (5)	6 (9)	7 (11)	20 (22)	63 (89)	*13 (10)*
Chemicals	4 (6)	— (1)	— (1)	—	—	5 (8)	2 (6)	5 (6)	16 (28)	*3 (3)*
Telecommunications	4 (10)	—	3 (4)	— (1)	—	1 (5)	4 (7)	2 (2)	14 (29)	*3 (3)*
Mining	3 (8)	—	2 (4)	2 (3)	—	5 (11)	2 (6)	4 (4)	18 (36)	*4 (4)*
Steel	2 (6)	—	— (1)	1 (2)	—	1 (1)	— (1)	—	4 (11)	*1 (1)*
Other metal	2 (2)	—	—	2 (2)	—	6 (8)	1 (2)	2 (2)	13 (16)	*3 (2)*
Other	11 (17)	— (1)	—	1 (3)	2 (5)	8 (12)	7 (12)	4 (6)	33 (56)	*7 (6)*
Total	157 (378)	18 (32)	27 (46)	17 (30)	12 (32)	68 (110)	70 (137)	116 (166)	485 (931)	
Percentage of total	*32 (41)*	*4 (3)*	*6 (5)*	*4 (3)*	*2 (3)*	*14 (12)*	*14 (15)*	*24 (18)*		*100*

TABLE 8. POST FEASIBILITY - CONSULTANTS: ANALYSIS BY MARKET AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	UK overseas subsidiary	French	German	Italian	USA	Other foreign	Local	Total	% of total
Middle East/N. Africa	42 (151)	—	10 (21)	6 (12)	6 (23)	9 (33)	25 (69)	9 (23)	107 (332)	*22 (36)*
Rest of Africa	17 (106)	4 (17)	9 (14)	5 (6)	4 (6)	6 (13)	12 (29)	9 (36)	66 (227)	*14 (24)*
India/Pakistan/Ceylon	14 (18)	—	2 (3)	2 (3)	—	5 (11)	4 (4)	10 (11)	37 (50)	*7 (5)*
Far East	23 (24)	5 (5)	1 (1)	—	2 (2)	5 (5)	8 (8)	3 (3)	47 (48)	*10 (5)*
Australia/New Zealand	14 (20)	3 (3)	—	—	—	5 (5)	1 (1)	14 (15)	37 (44)	*7 (5)*
S. America	11 (14)	—	3 (4)	2 (4)	— (1)	4 (8)	6 (6)	8 (9)	34 (46)	*7 (5)*
N./Central America	5 (5)	—	1 (1)	—	—	15 (15)	9 (9)	23 (23)	53 (53)	*11 (6)*
Caribbean	12 (13)	5 (5)	—	—	—	12 (12)	3 (3)	16 (17)	48 (50)	*10 (5)*
Europe	19 (27)	1 (2)	1 (2)	2 (5)	—	7 (8)	2 (8)	24 (29)	56 (81)	*12 (9)*
Total	157 (378)	18 (32)	27 (46)	17 (30)	12 (32)	68 (110)	70 (137)	116 (166)	485 (931)	
Percentage of total	*32 (41)*	*4 (3)*	*6 (5)*	*4 (3)*	*2 (3)*	*14 (12)*	*14 (15)*	*24 (18)*		*100*

TABLE 9. CONTRACTS: ANALYSIS BY VALUE (WHERE KNOWN) AND SECTOR FOR 1969

	No. of projects for which contracts awarded	Less than £1m.		£1-5m.		£5-10m.		£10-20m.		Over £20m.		Total contracts for which value is known				Contracts for which value is not known	Total contracts awarded	
		No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	% of total	£m.	% of total	No.	No.	% of total
Civil engineering	40	14	7	14	35	10	74	2	21	—	—	40	*11*	137	*7*	8	48	*9*
Power	76	15	6	38	89	10	70	7	97	2	58	72	*20*	320	*15*	41	113	*21*
Water and agricultural	36	20	10	7	14	6	41	2	23	1	28	36	*10*	116	*6*	13	49	*9*
Social building	51	15	7	20	47	5	30	—	—	—	—	40	*11*	84	*4*	18	58	*11*
Transport	32	8	4	7	18	5	38	1	13	4	170	25	*7*	243	*11*	10	35	*7*
Chemicals	52	4	3	6	13	8	55	13	165	9	215	40	*10*	451	*21*	13	53	*10*
Telecommunications	38	9	3	17	43	2	13	—	—	2	94	30	*8*	153	*7*	11	41	*8*
Mining	9	2	1	—	—	1	7	—	—	—	—	3	*1*	8	—	8	11	*2*
Oil	15	2	1	1	5	1	6	3	35	3	85	10	*3*	132	*6*	8	18	*4*
Steel	19	8	4	9	19	6	42	2	37	2	150	27	*7*	252	*12*	14	41	*8*
Other metal	13	—	—	6	14	1	6	3	42	1	26	11	*3*	88	*4*	5	16	*3*
Paper	12	1	1	5	16	3	19	2	37	—	—	11	*3*	73	*3*	1	12	*2*
Other	33	6	2	12	26	3	22	3	31	—	—	24	*6*	81	*4*	9	33	*6*
Total	426	104	49	142	339	61	423	38	501	24	826	369		2,138		159	528	
Percentage of total		*28*	*2*	*38*	*16*	*17*	*20*	*10*	*23*	*7*	*39*		*100*		*100*			*100*

TABLE 10. CONTRACTS: ANALYSIS BY VALUE (WHERE KNOWN) AND MARKET FOR 1969

	No. of projects for which contracts awarded	Less than £1m.		£1-5m.		£5-10m.		£10-20m.		Over £20m.		Total contracts for which value is known				Contracts for which value is not known	Total contracts awarded	
		No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	% of total	£m.	% of total	No.	No.	% of total
Middle East	70	25	13	21	54	7	54	6	78	2	146	61	17	345	16	29	90	17
N. Africa	19	3	2	8	16	5	35	2	30	2	51	20	5	134	6	2	22	4
Rest of Africa	63	20	10	28	66	6	40	1	13	3	130	58	16	259	12	17	75	14
India/Pakistan/Ceylon	22	5	2	2	5	8	57	—	—	4	96	19	5	160	8	6	25	5
Far East	35	4	2	18	43	6	39	5	65	—	—	33	9	149	7	10	43	8
Australia/New Zealand	29	5	3	8	23	4	29	3	38	—	—	20	5	93	4	14	34	6
S. America	44	5	2	13	32	10	68	5	66	4	152	37	10	320	15	16	53	10
N /Central America	33	5	2	9	21	4	25	7	90	3	76	28	8	214	10	13	41	8
Caribbean	26	14	5	8	18	2	13	1	12	—	—	25	7	48	2	5	30	6
W. Europe	62	13	6	23	52	6	43	3	42	4	127	49	13	270	13	41	90	17
E. Europe	23	5	2	4	9	3	20	5	67	2	48	19	5	146	7	6	25	5
Total	426	104	49	142	339	61	423	38	501	24	826	369		2,138		159	528	100
Percentage of total		28	2	38	16	17	20	10	23	7	39		100		100			100

TABLE 11. CONTRACTS AWARDED: ANALYSIS BY MARKET AND SECTOR FOR 1969 (Since January 1 1968 in brackets)

	Civil engineering	Power	Water & agricultural	Social building	Transport	Chemicals	Telecommunications	Mining	Oil	Steel	Other metal	Other	Total	% of total
Middle East/N. Africa	10 (26)	19 (40)	27 (47)	14 (26)	8 (13)	5 (11)	9 (13)	— (1)	6 (10)	2 (8)	4 (4)	8 (17)	112 (216)	21 (29)
Rest of Africa	5 (18)	17 (26)	3 (5)	17 (21)	8 (17)	3 (6)	1 (6)	3 (7)	1 (2)	7 (7)	—	10 (10)	75 (125)	14 (17)
India/Pakistan/Ceylon	8 (9)	4 (10)	— (2)	—	— (1)	8 (9)	2 (2)	— (1)	—	—	2 (3)	1 (3)	25 (40)	5 (5)
Far East	4 (4)	12 (12)	6 (6)	1 (1)	4 (4)	5 (5)	2 (5)	1 (1)	1 (1)	—	2 (2)	5 (5)	43 (46)	8 (6)
Australia/New Zealand	7 (7)	4 (9)	1 (2)	2 (2)	4 (4)	2 (2)	5 (5)	5 (5)	1 (1)	3 (4)	—	—	34 (41)	6 (5)
S. America	5 (7)	12 (15)	2 (2)	2 (2)	2 (3)	6 (8)	9 (10)	2 (2)	3 (4)	4 (4)	1 (1)	5 (6)	53 (64)	10 (9)
N./Central America	2 (2)	10 (10)	—	5 (5)	2 (2)	4 (4)	2 (3)	— (1)	3 (3)	2 (3)	4 (4)	7 (7)	41 (44)	8 (6)
Caribbean	2 (2)	1 (1)	7 (8)	10 (10)	3 (3)	1 (1)	4 (4)	—	—	—	—	2 (2)	30 (31)	6 (4)
W. Europe	5 (6)	32 (35)	2 (3)	7 (7)	4 (4)	9 (9)	6 (6)	—	3 (3)	19 (19)	1 (1)	2 (2)	90 (95)	17 (13)
E. Europe	— (1)	2 (4)	1 (1)	—	— (1)	10 (15)	1 (1)	—	—	4 (4)	2 (8)	5 (12)	25 (47)	5 (6)
Total	48 (82)	113 (162)	49 (76)	58 (74)	35 (52)	53 (70)	41 (55)	11 (18)	18 (24)	41 (49)	16 (23)	45 (64)	528 (749)	
Percentage of total	9 (11)	21 (22)	9 (10)	11 (10)	7 (7)	10 (9)	8 (7)	2 (2)	4 (3)	8 (7)	3 (3)	8 (9)		100

TABLE 12. CONTRACTS AWARDED: ANALYSIS BY SECTOR AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	UK/local & UK/ foreign	UK overseas subsidiary	French	German	Italian	Japanese	Eastern European	USA	Other foreign	Local	Total	% of total
Civil engineering	8 (12)	4 (4)	4 (5)	2 (5)	1 (2)	2 (6)	2 (2)	4 (10)	1 (1)	5 (12)	15 (23)	48 (82)	9 (11)
Power	29 (40)	2 (2)	3 (4)	8 (11)	14 (19)	7 (15)	5 (7)	5 (9)	7 (9)	17 (20)	16 (26)	113 (162)	21 (22)
Water and agricultural	7 (11)	1 (1)	2 (2)	2 (4)	8 (9)	—	2 (2)	4 (9)	1 (1)	8 (15)	14 (22)	49 (76)	9 (10)
Social building	13 (15)	—	9 (9)	2 (3)	2 (2)	1 (3)	—	— (3)	2 (2)	5 (8)	24 (29)	58 (74)	11 (10)
Transport	5 (10)	1 (1)	2 (3)	2 (2)	2 (2)	3 (7)	1 (1)	1 (2)	—	5 (8)	13 (16)	35 (52)	7 (7)
Chemicals	18 (24)	3 (3)	2 (2)	3 (3)	2 (3)	2 (4)	7 (11)	1 (1)	7 (10)	2 (3)	6 (6)	53 (70)	10 (9)
Telecommunications	18 (28)	—	1 (1)	1 (3)	2 (2)	—	10 (11)	—	5 (5)	— (1)	4 (4)	41 (55)	8 (7)
Mining	4 (6)	—	—	— (2)	— (1)	1 (1)	1 (1)	—	—	1 (3)	4 (4)	11 (18)	2 (2)
Oil	5 (8)	—	3 (3)	1 (1)	—	— (1)	3 (3)	1 (1)	4 (5)	—	1 (2)	18 (24)	4 (3)
Steel	18 (20)	2 (2)	—	3 (4)	5 (6)	2 (2)	2 (2)	1 (3)	2 (3)	3 (3)	3 (4)	41 (49)	8 (7)
Other metal	4 (8)	—	—	— (1)	4 (5)	—	—	3 (3)	2 (2)	1 (1)	2 (3)	16 (23)	3 (3)
Other	21 (30)	—	1 (1)	3 (3)	6 (8)	1 (3)	3 (3)	1 (1)	2 (3)	5 (8)	2 (4)	45 (64)	8 (9)
Total	150 (212)	13 (13)	27 (30)	27 (42)	46 (59)	19 (42)	36 (43)	21 (42)	33 (41)	52 (82)	104 (143)	528 (749)	
Percentage of total	28 (28)	2 (2)	5 (4)	5 (6)	9 (8)	4 (6)	7 (6)	4 (5)	6 (5)	10 (11)	20 (19)		100

TABLE 13. CONTRACTS AWARDED: ANALYSIS BY MARKET AND NATIONALITY FOR 1969 (Since January 1 1968 in brackets)

	UK	UK/local & UK/ foreign	UK overseas subsidiary	French	German	Italian	Japanese	Eastern European	USA	Other foreign	Local	Total	% of total
Middle East	14 (37)	3 (3)	1 (1)	8 (15)	17 (21)	2 (6)	3 (6)	6 (12)	6 (11)	12 (24)	18 (26)	90 (162)	17 (22)
N. Africa	6 (12)	—	—	4 (6)	3 (4)	2 (8)	—	5 (16)	1 (2)	— (4)	1 (2)	22 (54)	4 (7)
Rest of Africa	18 (25)	1 (1)	10 (13)	1 (5)	5 (7)	7 (16)	2 (3)	1 (3)	3 (4)	10 (20)	17 (28)	75 (125)	14 (17)
India/Pakistan/Ceylon	2 (7)	—	—	2 (3)	1 (2)	2 (3)	6 (8)	5 (6)	1 (1)	1 (3)	5 (7)	25 (40)	5 (5)
Far East	15 (18)	3 (3)	2 (2)	—	2 (2)	3 (3)	6 (6)	—	2 (2)	4 (4)	6 (6)	43 (46)	8 (6)
Australia/New Zealand	9 (10)	—	3 (3)	—	—	—	8 (8)	—	3 (3)	1 (1)	10 (16)	34 (41)	6 (5)
S. America	17 (20)	1 (1)	3 (3)	1 (1)	8 (9)	1 (3)	5 (5)	1 (1)	3 (4)	6 (8)	7 (9)	53 (64)	10 (9)
N./Central America	12 (13)	1 (1)	1 (1)	1 (1)	1 (3)	—	3 (3)	—	6 (6)	4 (4)	12 (12)	41 (44)	8 (6)
Caribbean	13 (13)	—	4 (4)	—	—	—	—	—	3 (3)	4 (4)	6 (7)	30 (31)	6 (4)
W. Europe	30 (31)	4 (4)	3 (3)	6 (6)	8 (8)	2 (3)	1 (1)	1 (1)	5 (5)	8 (8)	22 (25)	90 (95)	17 (13)
E. Europe	14 (26)	—	—	4 (5)	1 (3)	—	2 (3)	2 (3)	—	2 (2)	— (5)	25 (47)	5 (6)
Total	150 (212)	13 (13)	27 (30)	27 (42)	46 (59)	19 (42)	36 (43)	21 (42)	33 (41)	52 (82)	104 (143)	528 (749)	
Percentage of total	28 (28)	2 (2)	5 (4)	5 (6)	9 (8)	4 (6)	7 (6)	4 (5)	6 (5)	10 (11)	20 (19)		100

TABLE 14. CONTRACTS: ANALYSIS BY VALUE (WHERE KNOWN) AND NATIONALITY FOR 1969

	Less than £1m.		£1-5m.		£5-10m.		£10-20m.		Over 20m.		Total contracts for which value is known				Contracts for which value is not known	Total contracts awarded	
	No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	£m.	No.	% of total	£m.	% of total	No.	No.	% of total
United Kingdom	45	21	45	118	22	140	9	122	4	104	125	34	505	24	25	150	28
United Kingdom/local/foreign	4	2	3	7	1	9	1	11	1	38	10	3	67	3	3	13	2
United Kingdom overseas subsidiary	12	5	6	10	4	24	1	13	—	—	23	6	52	3	4	27	5
French	3	1	2	5	4	34	6	83	2	51	17	5	174	8	10	27	5
German	3	2	23	57	2	13	1	14	1	30	30	8	116	5	16	46	9
Italian	2	1	8	22	1	7	1	12	2	51	14	4	93	4	5	19	4
Japanese	3	1	9	23	4	28	3	37	1	20	20	5	109	5	16	36	7
Eastern European	—	—	6	16	3	19	1	10	4	191	14	4	236	11	7	21	4
United States	2	1	5	13	4	29	7	89	2	55	20	5	187	9	13	33	6
Other foreign	12	5	11	27	7	49	3	34	2	100	35	10	215	10	17	52	10
Local	18	10	24	41	9	71	5	76	5	186	61	16	384	18	43	104	20
Total	104	49	142	339	61	423	38	501	24	826	369		2,138		159	528	
Percentage of total	*28*	*2*	*38*	*16*	*17*	*20*	*10*	*23*	*7*	*39*		*100*		*100*			*100*

Main breakwater at Port Rashid, Dubai. The total value of work undertaken by Costain Civil Engineering Ltd. on harbour and airport projects at Dubai is £24 million. Consulting engineers for the harbour project are Sir William Halcrow and Partners.

ENGINEERING INDUSTRIES, *continued*

Table 2. Engineering Industries (Orders VII, VIII and IX and Part Orders XI (†) seasonally adjusted).

Index numbers of the volumes of orders and deliveries‡

	Total			Home			Export		
	Orders in hand (end period)	Net new orders	Deliveries	Orders in hand (end period)	Net new orders	Deliveries	Orders in hand (end period)	Net new orders	Deliveries
	December 1963 (unadjusted = 100)	Average 1963 deliveries = 100)		December 1963 (unadjusted = 100)	Average 1963 deliveries = 100)		December 1963 (unadjusted = 100)	Average 1963 deliveries = 100)	
1963	101	106	100	102	106	100	99	105	100
1964	119	122	109	120	125	113	118	113	102
1965	123	114	112	122	116	115	126	111	106
1966	118	115	119	117	118	121	120	108	112
1967	108	113	120	102	114	125	124	110	107
1968	108	125	125	99	127	129	133	120	115
1969	117	139	132	101	134	133	166	150	131
1967 1st quarter	112	104	119	112	106	122	114	99	111
2nd quarter	113	120	119	110	119	124	121	122	107
3rd quarter	112	117	121	108	119	127	124	112	106
4th quarter	108	109	119	102	111	126	124	104	105
1968 1st quarter	107	119	121	100	119	125	128	120	110
2nd quarter	104	118	127	98	124	130	124	108	117
3rd quarter	104	125	125	96	122	130	130	132	118
4th quarter	108	134	127	99	140	131	133	122	116
1969 1st quarter	111	136	127	99	131	130	145	149	120
2nd quarter	119	155	133	104	146	132	162	174	134
3rd quarter	116	124	133	100	120	133	162	134	133
4th quarter	117	140	136	101	139	136	166	144	136
1970 1st quarter p	123	157	142	105	150	139	176	172	149
1968 October	105	130	123	96	138	128	130	114	108
November	106	135	128	98	141	132	131	122	116
December	108	138	130	99	142	133	133	130	124
1979 January	107	136	126	98	135	128	133	139	121
February	109	138	127	99	129	131	140	158	118
March	111	134	128	99	127	130	145	149	121
April	118	182	126	106	184	129	152	169	121
May	119	146	134	106	137	133	157	169	136
June	119	137	138	104	117	135	162	184	146
July	115	91	126	100	84	125	159	108	128
August	115	137	132	100	137	133	160	138	130
September	116	144	142	100	139	142	162	156	142
October	116	141	139	100	141	139	163	143	140
November	117	140	133	100	139	135	165	143	128
December	117	139	136	101	137	134	166	144	141
1970 January p	121	174	141	103	154	137	176	223	149
February p	120	130	138	102	127	136	175	136	144
March p	123	166	146	105	170	143	176	155	154
April p	123	149	143	102	118	142	187	226	147
Average:									
Latest three months	123	148	142	102	138	140	187	174	148
Previous three months	121	151	136	103	143	135	176	170	139
Percentage change (§)	*+2*	*- 2*	*+4*	*- 1*	*- 4*	*+4*	*+6*	*+2*	*+6*

(†) Engineering and electrical goods (SIC Orders VII, VIII and IX), locomotives and railway track equipment, railway carriage and wagons, heavy commercial vehicles and wheeled tractors (Part SIC Order XI)
(‡) At constant prices
(§) In the case of orders on hand, the percentage changes compare the level at the end of the latest months shown with the corresponding level three months earlier

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Shipping movement at United Kingdom ports

Foreign and coasting trade movement during February 1970

THE TOTAL NET TONNAGE of vessels in the foreign trade which entered and cleared United Kingdom ports with cargo during February 1970 amounted to 15,195 thousand net tons; this was 11·1 per cent more than the tonnage for February 1969. Commonwealth vessels accounted for 6,162 thousand nrt.

During the first two months of the year, the total net tonnage of entrances and clearances with cargo amounted to 31,285 nrt, an increase of 7·4 per cent over the same period for 1969. Vessels of foreign flags accounted for 60·1 per cent of this tonnage.

In the coasting trade the total net tonnage of arrivals and departures with cargo during February 1970 showed virtually no change compared with 1969 and during the first two months of the year there was an increase of 1·2 per cent over the previous year.

Note: net registered tons (nrt)

The net registered tonnage is the measure of the size of a vessel and is normally used in the assessment of light, port and dock dues in the United Kingdom. It is obtained by deducting from the gross registered tonnage an allowance for the area occupied by machinery, bunkers, water ballast and crew space.

Definitions

(1) The foreign trade statistics relate to voyages direct from any port abroad to a port in the United Kingdom, or vice versa, or from one port to another in the United Kingdom, so long as the vessel has onboard cargo shipped abroad, or shipped in the United Kingdom for discharge abroad, or passengers from or for a port outside the United Kingdom.

The coasting trade statistics include vessels carrying only coastwise cargo or passengers from port to port in the United Kingdom, and vessels moving between these ports without at the time having onboard caro or passengers from or for a port abroad. For example, the coastwise movement in ballast includes foreign trade vessels which, having complete the discharge of cargo or passengers from abroad at one United Kingdom port, proceed coastwise to another port to load for the return voyage.

(2) Cargo figures relate to vessels which load or unload merchandise, bullion, specie, or mail, except those loading or unloading only Government stores, bunkers or ship's stores.

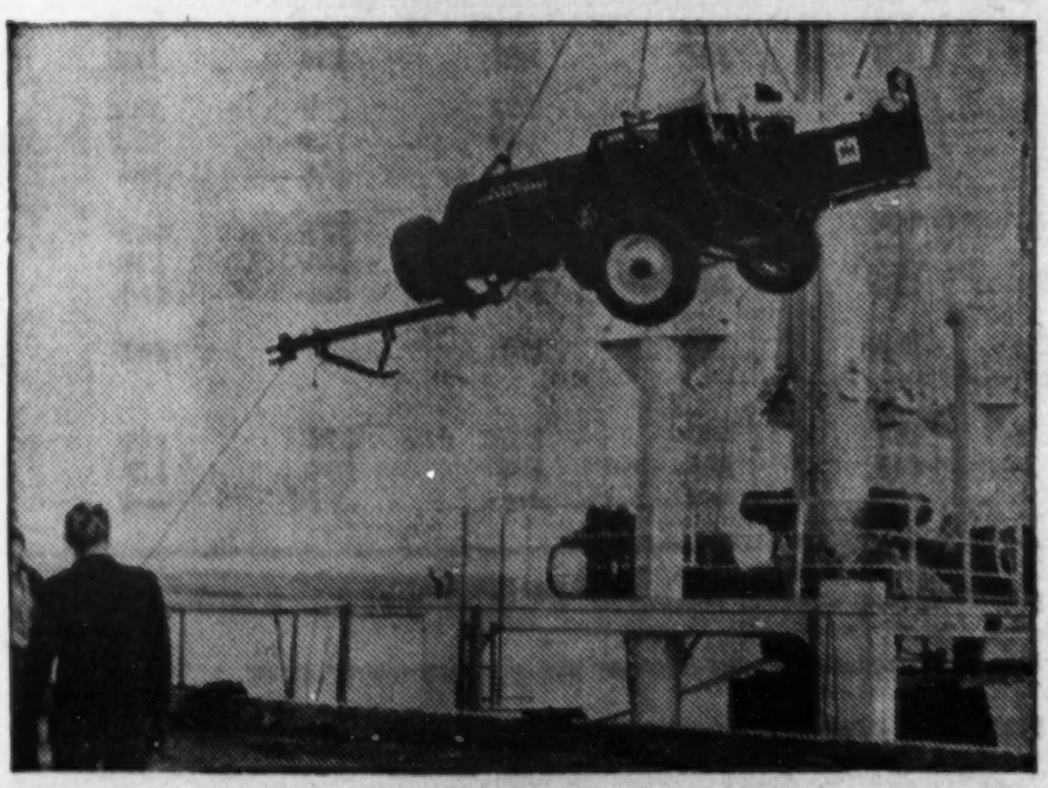
(3) Ballast figures relate to all vessels other than those defined in (2) and include vessels loading or unloading only Government stores, bunkers, ship's stores or passengers.

(4) Vessels in the foreign trade, calling during the course of a single voyage at more than one port of the United Kingdom, are recorded as entered and cleared at one port only, but as arrived and departed at each subsequent port of call.

Table 1. Shipping movement at United Kingdom ports

Foreign Trade	Entered					Cleared				
		Thousand Net Tons					Thousand Net Tons			
	Number of Vessels	Total	United Kingdom	Other (†) Commonwealth	Foreign	Number of Vessels	Total	United Kingdom	Other (†) Commonwealth	Foreign
With cargo: February 1969	5,387	9,111	3,594	215	5,302	4,188	4,565	2,095	110	2,360
February 1970	5,192	9 774	3,499	265	6,010	4,609	5,421	2,221	177	3,023
Two months ending February 1969	11,396	19,311	7,254	457	11,600	8,968	9,822	4,538	267	5,017
Two months ending February 1970	10,760	20,044	6,959	549	12,536	9,554	11,241	4,551	409	6,281
In ballast: February 1969	1,138	1,680	603	71	1,006	2,340	5,718	1,923	154	3,641
February 1970	1,391	1,990	769	82	1,139	2,080	6,321	2,053	162	4,106
Two months ending February 1969	2,422	3,565	1,350	124	2,091	5,153	12,434	3,724	290	8,420
Two months ending February 1970	2,857	4,065	1,595	141	2,329	4,223	12,752	3,809	323	8,620

(†) Includes Irish Republic and South Africa.



An International B-47 pickup baler, one of a shipment of 105 from the Doncaster works of International Harvester Company of Great Britain Ltd., is swung aboard an Everard Line vessel at Gunness, Lincolnshire, en route for Denmark. The balers, market leaders in this type of British-built farm machinery, form part of the current year's baler orders from Denmark. Eleven farm tractors and two industrial tractors equipped with front loaders and backhoes were shipped with the balers, the total value of the consignment being approximately £90,000.

At London's King George V Dock, a Hawker Siddeley auto transformer, weighing 130 tons, is loaded for shipment to Durban, South Africa. This transformer was ordered by South Africa's Electricity Supply Commission from Hawker Siddeley Electric Export Ltd. and was built at Walthamstow, London, E.17, by Hawker Siddeley Power Transformers Ltd.

Table 2. Foreign trade entrances and clearances with cargo

Nationality of Vessels	Entered				Cleared			
	February		January-February		February		January-February	
	1969	1970	1969	1970	1969	1970	1969	1970
	Numbers of Vessels							
United Kingdom	1,575	1,467	3,302	3,027	1,350	1,388	2,880	2,856
Other Commonwealth (†)	118	136	292	291	103	143	238	318
Foreign	3,694	3,589	7,802	7,442	2,735	3,078	5,850	6,380
Total	5,387	5,192	11,396	10,760	4,188	4,609	8,968	9,554
	Thousand net tons							
Commonwealth:								
Registered in United Kingdom	3,594	3,499	7,254	6,959	2,095	2,221	4,538	4,551
Registered in Canada	—	—	—	-2	—	—	—	—
Registered in other countries (†)	215	265	457	547	110	177	267	409
Total Commonwealth	3,809	3,764	7,711	7,508	2,205	2,398	4,805	4,960
Foreign:								
Soviet	112	78	271	229	25	29	55	58
Finnish	95	101	186	273	26	55	68	90
Swedish	324	253	776	723	207	179	379	392
Norwegian	947	1,412	2,346	2,759	364	461	801	1,023
Danish	227	349	504	599	171	226	370	418
Polish	27	26	55	42	11	8	28	22
German (Federal Republic)	588	502	1,071	1,081	278	463	599	959
Dutch	525	547	1,318	993	393	438	887	873
Belgian	176	166	347	415	165	177	327	371
French	301	354	666	802	160	251	352	511
Spanish	61	69	124	150	54	55	123	131
Italian	150	119	291	345	24	7	57	45
Yugoslav	8	13	29	25	4	14	8	23
Greek	197	256	443	555	61	117	124	228
United States of America	60	230	157	584	65	199	158	527
Panamanian	218	146	411	274	133	53	176	94
Liberian	1,031	1,110	2,062	2,090	110	174	291	279
Other	255	279	543	597	109	117	214	237
Total Foreign	5,302	6,010	11,600	12,536	2,360	3,023	5,017	6,281
GRAND TOTAL	**9,111**	**9,774**	**19,311**	**20,044**	**4,565**	**5,421**	**9,822**	**11,241**
Trading Areas:								
Irish Republic	362	512	789	1,015	251	418	641	847
Northern Europe (Foreign)	2,742	2,660	5,571	5,621	2,104	2,332	4,475	4,950
Europe (Atlantic) and Western Mediterranean Countries	1,089	1,130	2,423	2,376	738	805	1,609	1,646
Central and Eastern Mediterranean Countries	1,017	1,094	2,185	2,170	175	168	339	336
West and South Africa	500	413	1,122	878	235	201	476	440
East Africa, Persian Gulf, India	1,791	1,915	3,801	3,737	207	317	455	483
Eastern Asia and Islands in the Pacific	217	237	431	392	154	164	315	333
Australasia	239	213	499	501	123	101	306	210
North America (Atlantic Coast)	395	1,003	898	2,108	372	634	772	1,432
West Indies and Central America (Atlantic Coast)	545	459	1,130	974	98	150	194	287
South America (Atlantic Coast)	135	69	287	178	72	58	132	172
South and Central America (Pacific Coast)	21	28	35	43	15	19	35	23
North America (Pacific Coast)	52	36	127	40	18	47	63	72
Other Areas	6	5	13	11	3	7	10	10
Total Commonwealth Countries	1,991	2,322	4,802	4,887	806	1,010	1,840	2,059
Total Foreign Countries	7,120	7,452	14,509	15,157	3,759	4,411	7,982	9,182
TOTAL	**9,111**	**9,774**	**19,311**	**20,044**	**4,565**	**5,421**	**9,822**	**11,241**

(†) Includes Irish Republic and South Africa.

(Continued on next page)

EXPORT PUBLICITY FOR INDUSTRY

Publicity for British exporters can often be obtained through use of the facilities of the Central Office of Information, who are concerned with collecting from industry items suitable for dissemination overseas by way of Government information services. The COI are interested in news items, feature article material, photographs, tape recordings for radio, films for television and other screening. Contact should be made with the nearest Regional Office:

NORTHERN: Mr. A. A. McLoughlin, Wellbar House, Gallowgate, Newcastle-upon-Tyne, NE1 4TB (0632 27575 – Telex 53277).

EAST & WEST RIDINGS: Mr. D. de M. Guilfoyle, OBE, City House, Leeds, 1 (0532 38232 – Telex EconPlan 55472 – message to be prefixed For COI).

NORTH MIDLAND: Mr. J. W. Dunscombe, MBE, Cranbrook House, Cranbrook Street, Nottingham, NG1 1EW (0602 46121 – Telex 37572).

EASTERN: Mr. P. L. K. Schwabé, MVO, Block A, Government Buildings, Brooklands Avenue, Cambridge (0223 58911 – Telex 81187).

LONDON & SOUTH EASTERN: Mr. E. A. Hunt, St. Christopher House Annexe, Sumner Street, London, S.E.1. (01-928 2371 – Telex 915444).

SOUTHERN: Mr. P. I. Ede, Market Place House, Reading, RG1 2EH (0734 581261 – Telex 84216).

SOUTH WESTERN: Mr. W. J. D. Irving, MVO, The Pithay, Bristol, BS1 2NQ (0272 2107 – Telex 44203).

MIDLAND: Mr. R. Dean, OBE, Five Ways House, Islington Row, Birmingham, 15 (021-643 8191 – Telex 33376).

NORTH WESTERN: Mr. H. V. Tillotson, Sunley Building, Piccadilly Plaza, Manchester, M1 4BD (061-832 9111 – Telex 66199).

SCOTTISH OFFICE: Scottish Information Office, St. Andrew's House, Edinburgh, 1 (031-556 8501). *District Office:* 314 St. Vincent Street, Glasgow, C2 (041-221 5670 – Telex 77583).

ULSTER OFFICE: Director of Information, Northern Ireland Information Service, Stormont Castle, Belfast, BT4 3ST (0232 and 63011).

WELSH OFFICE: Mr. Idris Evans, MVO, Director, Welsh Information Division, 42 Park Place, Cardiff, CF1 3PY (0222 28066 – Telex 49327).

SHIPPING MOVEMENT. *continued*

Table 3. Foreign trade arrivals and departures at principal ports – January-February

Port	Arrived						Departed					
	With cargo			With cargo and in ballast			With cargo			With cargo and in ballast		
	1969	1970		1969	1970		1969	1970		1969	1970	
	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels
Bristol	490	377	203	495	386	220	51	58	72	506	444	196
Cardiff	200	182	106	239	243	144	61	121	92	276	290	157
Dover	1,016	1,124	875	1,264	1,408	1,167	972	1,075	819	1,262	1,387	1,152
Felixstowe	364	495	373	384	532	421	323	490	381	363	518	413
Folkestone	70	72	60	79	81	68	66	62	52	79	85	70
Grimsby (including Immingham)	754	934	359	880	1,107	434	328	331	256	877	1,128	466
Harwich	1,211	1,347	699	1,243	1,385	729	1,225	1,370	730	1,241	1,388	739
Holyhead	218	222	199	220	224	203	122	224	203	125	224	204
Hull	793	701	737	844	752	782	443	384	436	790	745	676
Lancaster	–	2	5	5	5	13	4	6	17	4	6	17
Liverpool	1,782	2,231	738	2,074	2,581	867	740	1,035	517	2,047	2,423	765
London	4,892	4,668	1,920	6,131	5,905	2,377	1,988	2,305	1,402	5,615	5,865	2,399
Manchester	962	858	425	1,015	894	487	247	305	372	918	726	524
Middlesbrough	939	927	273	1,122	1,166	440	267	423	404	1,104	1,166	517
Milford Haven	1,966	1,906	75	2,434	2,353	234	424	490	149	2,360	2,345	223
New Haven	87	103	122	88	104	127	84	90	96	89	111	132
Newport	247	269	123	270	293	148	69	100	117	243	294	157
Plymouth	38	18	57	75	33	116	25	22	80	87	68	126
Port Talbot	160	128	71	171	160	105	30	31	84	169	156	125
Southampton	1,906	1,992	414	2,229	2,427	537	834	900	396	2,175	2,538	563
Swansea	79	155	69	204	333	181	305	433	263	338	467	273
Tyne Ports	284	236	190	360	305	219	146	120	110	459	461	208
Glasgow	477	434	179	589	523	204	276	255	120	587	597	232
Grangemouth	223	251	177	297	295	206	319	183	132	399	282	206
Greenock	247	501	40	353	595	85	9	215	40	516	622	75
Leith	111	81	126	388	121	165	367	30	81	432	102	141
Belfast	441	401	219	461	498	252	57	68	89	362	371	178
Other Ports	1,153	1,058	2,392	1,639	1,654	3,621	910	755	2,322	1,932	1,704	3,680
TOTAL	21,110	21,673	11,426	25,553	26,363	14,552	10,692	11,881	9,832	25,355	26,513	14,614

Table 4. Coasting trade arrivals and departures at principal ports – January-February

Port	Arrived						Departed					
	With cargo			With cargo and in ballast			With cargo			With cargo and in ballast		
	1969	1970		1969	1970		1969	1970		1969	1970	
	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels	Thous. net tons	Thous. net tons	Number of vessels
Bristol	195	220	134	227	280	391	79	51	263	277	346	546
Cardiff	85	113	137	149	197	279	23	31	100	136	149	275
Cowes	332	336	1,521	717	837	3,287	310	317	1,390	716	836	3,291
Hull	115	170	54	136	205	114	38	63	77	183	209	184
Immingham	113	48	17	295	453	195	209	317	181	334	364	210
Lancaster	163	169	204	184	195	291	176	190	284	180	196	288
Liverpool	715	621	438	935	860	822	531	469	676	980	1,001	918
London	1,046	1,066	759	1,291	1,331	1,203	241	270	464	1,247	1,248	1,178
Manchester	16	38	47	48	60	93	16	20	32	65	66	80
Middlesbrough	15	17	58	234	316	302	218	269	154	247	361	225
Milford Haven	66	69	16	761	728	311	686	800	330	709	832	345
Portsmouth	65	63	300	490	584	3,059	19	13	158	482	574	3,047
Preston	207	203	308	212	219	340	197	203	314	222	228	363
Southampton	478	503	1,373	990	976	1,866	841	863	1,624	990	1,034	1,875
Sunderland	50	21	27	231	191	182	157	166	140	191	191	173
Swansea	65	47	87	394	416	503	265	246	321	288	287	411
Tyne Ports	88	90	48	555	450	339	300	251	227	488	405	344
Ardrossan	241	217	295	252	227	338	138	154	295	201	212	335
Glasgow	112	198	130	190	292	185	34	73	56	173	213	157
Greenock	217	202	406	258	227	438	234	191	391	262	233	454
Stranraer	260	258	204	261	259	205	259	257	200	261	259	205
Belfast	1,122	1,100	1,230	1,174	1,152	1,353	985	927	1,038	1,265	1,172	1,412
Other Ports	1,806	1,863	4,076	2,938	2,912	6,099	1,348	1,289	2,531	2,753	2,717	5,850
TOTAL	7,572	7,632	11,869	12,922	13,367	22,195	7,304	7,430	11,246	12,650	13,133	22,166

COLOUR BLOCKS FOR 'JOURNAL' FRONT COVER

Colour cover blocks: *Now that the* Journal *is using four-colour illustrations each week on the cover, the Editor will be pleased to consider prints of suitable export pictures for which letter-press blocks are available. Colour transparencies from which the submitting firm intend to have blocks made for their own publicity purposes will also be considered.*

Black and white prints: *These should be 'action' photographs showing United Kingdom goods being inspected by overseas buyers or in process of being packed or shipped for export or being unloaded, installed or in use at the overseas destination. Photographs of United Kingdom businessmen in discussion with overseas buyers and of visitors of exhibition stands overseas are also acceptable.*

Table 5. Shipping movement at United Kingdom ports

	Arrived				Departed			
		Thousand Net Tons				Thousand Net Tons		
	Number of Vessels	Total	Commonwealth (†)	Foreign	Number of Vessels	Total	Commonwealth (†)	Foreign
COASTING TRADE – GREAT BRITAIN								
With cargo: February 1969	5,016	2,991	2,419	572	4,620	2 991	2,370	621
„ February 1970	4,814	3,022	2,290	732	4,606	3,032	2,234	798
„ Two months ending February 1969	10,539	6,346	5,145	1,201	9,905	6,280	5,065	1,215
„ „ February 1970	10,375	6 420	4,941	1,479	10,045	6,446	4,871	1,575
In ballast: February 1969	4,168	2,524	1,875	649	4,516	2,363	1,813	550
„ February 1970	4,460	2,845	1 989	856	4,482	2,495	1,813	682
„ Two months ending February 1969	9,016	5,287	4,025	1,262	9,469	4,993	3,874	1,119
„ „ „ February 1970	10,156	5,668	4,007	1,661	10,375	5,380	3,991	1,389
COASTING TRADE – UNITED KINGDOM								
With cargo: February 1969	5,759	3,570	2,934	636	5,217	3,497	2,813	684
„ February 1970	5 534	3,600	2,747	853	5,159	3,471	2,606	865
„ Two months ending February 1969	12,062	7,572	6,229	1,343	11,101	7,304	5,987	1,317
„ „ „ February 1970	11,869	7,632	5,967	1,665	11,246	7,430	5,748	1,682
In ballast: February 1969	4,250	2,547	1,890	657	4,794	2,518	1,930	588
„ February 1970	4,527	2,868	2,002	866	4,749	2,664	1,915	749
„ Two months ending February 1969	9,192	5,350	4,064	1,286	10,047	5 346	4,141	1,205
„ „ „ February 1970	10,326	5,735	4,046	1 689	10,920	5,704	4,189	1 515

(†) Commonwealth and Irish Republic

General Index of Retail Prices for May

THE DEPARTMENT OF EMPLOYMENT and Productivity announce that at May 19, the official index figure which measures changes in the average level of retail prices compared with the level at January 16, 1962 (taken as 100), was 139.5 compared with 139.1 at April 21. The rise in the index during the month was due to uses in the average of levels of prices of a number of goods and services, which were partly offset by seasonal falls in the average levels of prices of household coal and coke.

Tourist boom continues

FOREIGN VISITORS continued to flock to Britain in April. The number of visitors at 312,000 was again a record for the month.

In the first four months of this year, nearly one million foreigners came to Britain, 22 per cent more than in the corresponding period last year. There were much larger increases in the numbers coming from some of the more distant countries, for example from Japan and South America.

After adjustment for expected seasonal variations, the level of arrivals was a little below the exceptionally high figure for March, but still way above the previous trend. European visitors were at practically the same level as in March (seasonally adjusted); the number of United States visitors was lower than in March, though substantially up on last year.

The March and April figures taken together suggest that there has been some further spreading of the tourist season, with more visitors coming in the Spring.

Recent trends are shown by the seasonally adjusted figures given in the following table.

Number of foreign visitors

(Thousands per month)

	Total		Western Europe	United States
	Unadjusted	Seasonally adjusted		
1964		160	95	49
1965		180	108	56
1966		207	123	63
1967		227	134	70
1968		259	157	73
1969 year		320	190	95
1st quarter	154	303	181	89
2nd quarter	356	321	197	90
3rd quarter	556	317	186	97
4th quarter	215	339	201	101
1970 January	149	350	200	108
February	147	351	201	109
March	296	397	228	125
April	312	372	227	105

The figures are based on Home Office records, and are limited to foreign visitors, who represent about two-thirds of all overseas visitors. They exclude Commonwealth citizens and visitors (other than United States citizens) arriving from the Irish Republic.

New companies registered

BELOW ARE details of new companies registered in Great Britain during May, 1970, showing nominal capital. The figures are exclusive of unlimited companies and companies limited by guarantee.

Nominal capital	Total	Public Companies	Private Companies
Not exceeding £100	1,579	—	1,579
Over £100 but under £1,000	95	—	95
£1,000 but under £10,000	558	—	558
£10,000 but under £50,000	80	—	80
£50,000 but under £100,000	4	—	4
£100,000 but under £1,000,000	4	—	4
£1,000,000 and over	2	—	2
Total number	2,322	—	2,322
	£ thous.	£ thous.	£ thous.
Total amount of Nominal Capital	10 323	—	10,323

Companies registered in Great Britain in 1969 and 1970

	1969		*1970*	
	Nominal	Nominal Capital £ thous.	Number	Nominal Capital £ thous.
January	2,077	6,597	2,087	5,528
February	1,892	7,408	2,156	7,556
March	2,227	25,151	2,464	5,098
April	2,066	5,614	2,556	7,657
May	2,089	6,272	2,322	10,323
June	1,979	5,643		
July	2,133	10,764		
August	1,880	4,667		
September	1,841	6,324		
October	1,806	5,062		
November	1,988	4,221		
December	2,150	4,399		
Total	24,128	92,122		

EXPORT HANDBOOKS

The Board of Trade has issued four Export Handbooks – 'Services for British Exporters', 'ECGD Credit Insurance and Financial Support Services', 'Organization for Overseas Marketing' and 'Agency Legislation and Practice Abroad'. Together they contain over 300 pages of information that every exporter should have. To get as many free copies of these four Handbooks as you require for day-to-day use by your export staff, write now to Information Division, United Kingdom Publicity Section (707), Board of Trade, 1 Victoria Street, London, S.W.1.

Business Monitor

THE FOLLOWING TITLES and issues of Business Monitor are now available and copies may be obtained by annual subscription from HMSO, PO Box 569, London, S.E.1.

Production Series:

Monthly at £1 a year post free:

Imported Timber for April 1970

Foam Backing, Foam Laminating and Fabric to Fabric Bonding for March 1970

A complete list of titles in the Production Series was last published in the *Board of Trade Journal* on March 18 on page 736.

Miscellaneous Series:

Monthly at £5 5s. a year post free:

Motor Vehicle Registrations for April 1970

Civil Aviation Series:

Airport Activity for November 1969

Air Passengers for November 1969

Air Freight and Mail for November 1969

A complete list of titles in the Civil Aviation Series is as follows:

Airport Activity (M)
Air Passengers (M)
Air Freight and Mail (M)
Airlines (M)
Airlines (Q)
Domestic Passenger Traffic (Q)
Air Passengers – international and cabotage (Q).

Output of the wool textile industry

THE VOLUME of production in the wool textile industry in April was at the same level as in April, 1969.

Statistics issued by the Wool Industry Bureau of Statistics show that in the four months January-April deliveries of woven fabrics (excluding blankets) were 10 per cent less than in the same period of 1969, deliveries of worsted yarn (excluding semi-worsted yarn) were 4 per cent less. Production of wool and hair tops was 7 per cent less, but that of man-made fibre tops was 6 per cent more.

Output of the wool textile industry

	Consumption	Production				Deliveries		
	Raw wool (clean weight)	Tops		Woollen yarn (†)	Worsted yarn (§)	Woven fabrics (excluding blankets) (‡)		Blankets (†)
		Wool and hair	Man-made fibres			Woollen	Worsted	
	Million lb.					Million sq. yds.		
1963	457·8	304·0	42·2	313·1	239·7	176·8	148·6	35·1
1964	418·3	265·2	56·8	325·8	233·3	177·1	148·3	32·9
1965	402·6	247·6	57·1	321·8	227·6	175·3	147·6	32·8
1966	388·2	229·8	62·9	314·7	220·9	168·4	133·9	30·5
1967	359·9	203·1	60·9	304·4	197·6	163·2	131·3	28·7
1968	391·4	213·0	80·2	324·9	216·6	162·4	132·3	32·7
1969	384·6	202·9	93·0	313·6	221·5	155·6	130·6	32·2
1968 1st qtr.	102·9	57·0	19·0	85·0	54·5	39·8	35·5	9·0
2nd qtr.	100·3	55·9	19·1	81·5	53·8	40·8	32·2	6·8
3rd qtr.	87·5	48·2	19·3	72·0	51·2	40·4	30·0	7·5
4th qtr.	100·6	51·9	22·8	86·5	56·9	41·5	34·6	9·4
1969 1st qtr.	105·4	55·3	23·9	86·3	58·0	37·9	34·9	7·9
2nd qtr.	100·6	52·8	22·7	82·9	57·2	40·8	32·2	10·2
3rd qtr.	84·7	45·7	21·6	66·3	48·9	38·8	29·6	5·6
4th qtr.	93·9	49·2	24·7	78·1	57·4	38·1	33·8	8·5
1970 1st qtr.	92·2	49·6	24·8	74·3	54·1	33·3	31·0	7·5
1969 Apr.	33·9	17·2	7·7	28·6	18·6	12·6	10·7	3·2
May	31·8	17·2	7·5	25·7	19·2	14·0	10·5	4·7
June	34·9	18·3	7·5	28·7	19·4	14·3	11·1	2·3
July	30·5	17·9	8·4	22·1	17·1	13·7	10·6	1·3
Aug.	23·0	10·6	5·0	20·5	14·1	11·0	7·9	1·9
Sept.	31·2	17·3	8·1	23·7	17·8	14·1	11·1	2·4
Oct.	33·5	17·4	9·0	27·5	21·2	13·7	11·9	2·7
Nov.	30·5	16·0	8·6	25·3	18·3	12·9	11·3	2·3
Dec.	29·9	15·7	7·2	25·3	17·9	11·5	10·7	3·5
1970 Jan.	31·8	17·5	9·0	25·8	17·8	12·0	10·5	2·8
Feb.	29·8	16·1	7·8	23·8	18·3	10·5	10·0	2·6
Mar.	30·6	16·0	8·0	24·7	17·9	10·8	10·5	2·1
Apr.	32·6	18·0	8·8	25·9	21·2	12·0	10·7	2·3

(†) Estimated. (‡) Woven woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components. (§) From January 1969 includes semi-worsted yarn; previously yarn of this type was not separately distinguished and the small quantities involved were divided between the woollen and worsted yarn headings. In April deliveries of semi-worsted yarn were 1·4 million lb.

Production in the cotton industry

THE VOLUME of production in the cotton industry (including the processing of man-made continuous filament yarn and finishing) in April, 1970, was 8 per cent more than in April, 1969 (which included the Easter Holiday).

Statistics issued by the Textile Council show that in the four months January-April the amount of cloth woven was 2 per cent less than in the corresponding period of 1969. Production of both single and doubled yarn was 1 per cent more.

Production in the cotton industry

Annual totals and weekly averages

	Single yarn (†)		Doubled yarn		Processed filament yarn	Woven cloth	
	Cotton yarn (‡)	Spun man-made fibre yarns and mixture yarn, inc. waste	Cotton yarn	Other	Textured yarn (§)	Cotton	Man-made fibre and mixtures
	Million lb.					Million lin. yards	
1963	488·7	127·0	131·4	107·0	..	1,014·1	560·3
1964	508·1	145·9	136·1	120·0	40·7	1,033·1	610·1
1965	484·8	142·5	131·5	120·3	47·5	1,015·0	624·4
1966	455·7	136·2	123·1	110·2	62·2	915·3	616·6
1967	383·8	124·8	108·1	105·2	78·4	745·0	529·8
1968	377·4	148·7	110·0	114·6	113·6	730·7	554·8
1969	366·4	161·3	103·2	134·3	150·5	723·4	588·7
1969 January*	7·5	3·1	2·1	2·4	3·0	14·4	11·5
February	7·5	3·1	2·2	2·5	3·2	14·7	11·8
March	7·7	3·0	2·1	2·7	3·1	14·9	12·1
April*	7·0	2·8	2·0	2·5	2·8	13·9	11·0
May	7·5	3·3	2·1	2·7	2·8	14·4	11·6
June	6·6	3·0	1·9	2·4	2·8	15·0	11·8
July*	5·3	2·3	1·6	2·1	2·2	9·3	8·2
August	7·1	3·3	1·8	2·6	2·4	14·3	11·1
September	6·0	2·8	1·8	2·4	3·0	12·2	10·4
October*	7·5	3·5	2·1	2·9	3·0	14·7	12·2
November	7·4	3·6	2·1	2·8	3·4	14·8	12·3
December*	6·2	3·0	1·7	2·3	2·7	12·3	10·0
1970 January	7·1	3·5	2·0	2·7	3·3	14·2	11·6
February	7·3	3·5	2·1	2·7	3·5	14·9	11·6
March*	6·7	3·2	1·9	2·5	3·3	13·8	10·3
April	7·5	3·6	2·1	2·7	3·6	15·0	11·1

(†) Spun in the cotton industry. (‡) Including yarns wholly of cotton waste and mixture yarn s of cotton and cotton waste. (§) Deliveries.

PLANNING GREATER SALES TO EUROPE

Managers of Thorn Lighting's seven European subsidiary companies gathered at London's Britannia Hotel recently for a three-day top-level sales conference (EUROCON). Their task was to discuss plans for Thorn's expanding lighting activities in Europe. The conference was chaired by Mr. George Leaf, Thorn Lighting's international division director. Also present were Mr. A. J. Ford, managing director; and Mr. L. Szemere, European general manager. Countries represented included France, Germany, Italy, Austria, Norway, Sweden and Denmark.

Textile and clothing industries: orders and deliveries

IN THE THREE MONTHS ended April net new orders received by the textile and clothing industries were provisionally estimated to have been about the same as in the three months ended January, 1970; deliveries were 4 per cent higher. Deliveries exceeded net new orders with the result that order books at the end of April were 3 per cent less than at the end of January.

The comparisons given above are based on the seasonally adjusted series in the accompanying table.

Textile and clothing industries†

Index numbers of the volume of total orders and deliveries (§)

	Ordess-on-hand (end period)		Net new orders		Deliveries	
	April 1959 = 100		Average 1959 deliveries = 100		Average 1959 deliveries = 100	
1960	136		103		103	
1961	104		91		99	
1962	100		92		93	
1963	117		100		95	
1964	124		99		98	
1965	121		98		99	
1966	105		92		97	
1967	114		93		91	
1968	129		99		96	
1969	124		96		97	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1968 1st quarter	117	117	99	97	96	94
2nd quarter	129	125	106	104	95	97
3rd quarter	122	129	85	100	92	96
4th quarter	129	129	107	97	100	96
1969 1st quarter	133	134	103	101	99	97
2nd quarter	135	131	101	99	100	102
3rd quarter	124	131	82	95	93	96
4th quarter	124	124	99	90	99	95
1970 1st quarter p	125	125	99	100	98	99
1969 January	130	130	94	99	91	95
February	133	133	110	105	103	98
March	133	134	103	97	102	97
April	135	135	101	100	95	99
May	137	132	102	98	99	101
June	135	131	101	100	105	106
July	133	132	80	97	87	94
August	128	132	75	92	89	95
September	124	131	91	98	102	100
October	125	129	107	89	104	94
November	127	124	112	91	105	96
December	124	124	78	88	87	94
1970 January p	127	127	99	104	91	95
February p	126	126	101	96	105	100
March p	125	125	96	100	97	102
April p	124	123	97	87	100	94

(†) Wool, hosiery (and other knitted goods), made-up clothing and the spinning, weaving and merchant converting sections of the cotton and man-made fibres industries. (§) At constant (average 1958) prices.

Hosiery and other knitted goods—index of production

IN THE THREE MONTHS ending April, 1970, the volume of production of hosiery and other knitted goods (including knitted fabrics) was provisionally estimated to have been 7 per cent more than in the three months ending January, 1970.

The above comparison has been based on the seasonally adjusted figures in the accompanying table.

The seasonally adjusted figures for 1970 are based on the seasonal pattern up to the end of 1969 and may be subject to slight revision when the complete figures for 1970 have been incorporated.

The actual figures allow for differences in the length of calendar months, but not for holidays or other seasonal variations.

A short note on the construction of the index was given in the *Board of Trade Journal*, dated May 27, 1970 (page 1455).

Index of the volume of production of hosiery and other knitted goods (including knitted fabrics)

1963–100

1963	100	
1964	109	
1965	114	
1966	114	
1967	114	
1968	132	
1969	147	
	Actual	Seasonally adjusted
1968 4th quarter	156	137
1969 1st quarter	133	144
2nd quarter	145	156
3rd quarter	142	142
4th quarter	166	146
1970 1st quarter p	145	161
1969 July	129	139
August	131	137
September	166	149
October	176	146
November	179	146
December	143	145
1970 January p	129	155
February p	158	162
March p	147	164
April p	149	150

USING EFTA

Opportunities for the British businessman in the free markets of EFTA are described in 'Using EFTA,' published by the EFTA Secretariat in Geneva. This 161 *page book provides basic information for the new exporter, outlines the procedures for claiming EFTA tariff treatment and gives useful facts and figures about individual EFTA countries. Copies, together with other EFTA publications (including the Secretariat's regular EFTA Bulletin) can be obtained free of charge from the Board of Trade's EFTA Information Centre,* 1 *Victoria Street, London, S.W.*1 *Tel.* 01-222 7877, *Ext.* 2479/80).

Registrations of British and foreign films

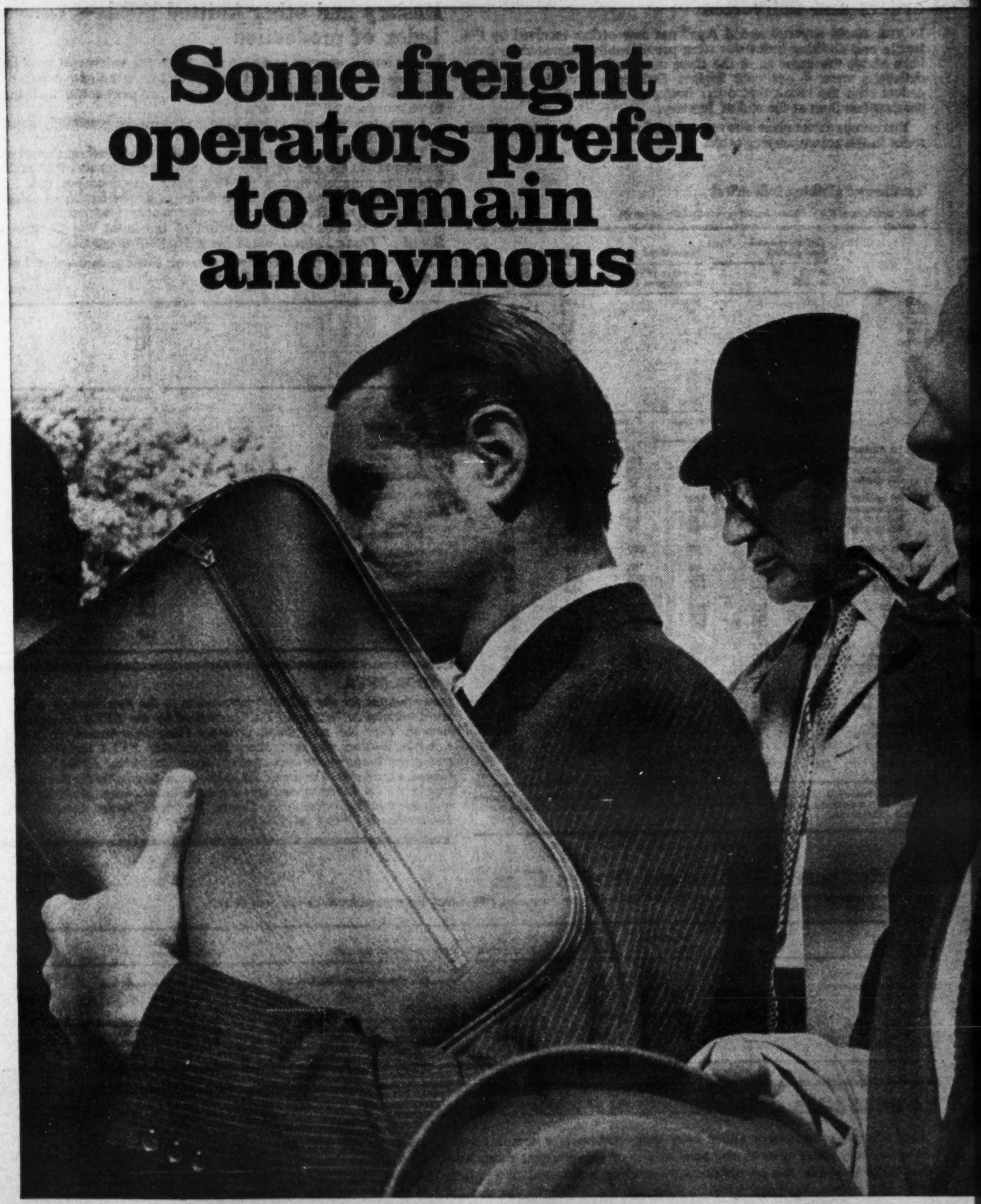
The following are details of films registered by the Board of Trade under the Films Acts, 1960 to 1966, during the week ended Friday, June 19, 1970
Br/E indicates that the film is a British quota film

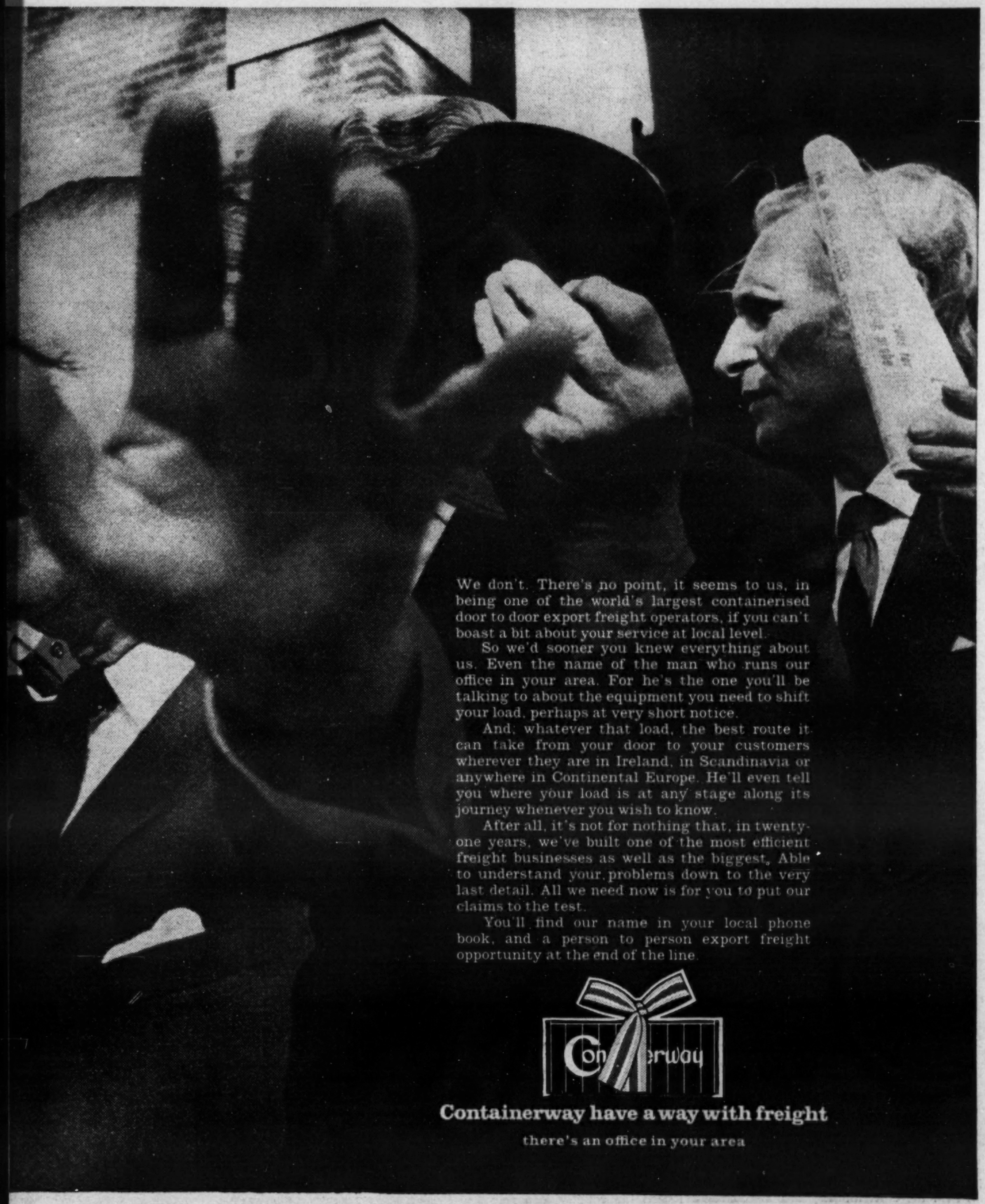
Title of Film	Registered No.	Playing Time Minutes	Date of Registration	Registered in the name of	Maker's name
				BRITISH	
Movietone News 2141	Br/E 34681	7	June 19	Twentieth Century-Fox Film Co. Ltd.	British Movietonews Ltd.
Movietone News 2141A	Br/E 34682	9	June 19	" " " "	" "
				FOREIGN	
Patton	F 34875	171	June 16	Twentieth Century-Fox Film Co. Ltd.	Twentieth Century-Fox Film Corp.
Poker With Pistols	F 34876	87	June 18	Ranworth Film Services Ltd.	Italicine T.V., Rome
The Naked Kiss	F 34877	93	June 18	Amanda Films Ltd.	F. and F. Productions Inc.
Shock Corridor	F 34878	101	June 18	" "	" "

CATALOGUES OF GOVERNMENT PUBLICATIONS

Her Majesty's Stationery Office offer their customers a comprehensive service which will enable them to judge whether any other titles in the vast output of Government Publications would help them in their work or leisure. Full information about this service can be obtained by sending a postcard to Publicity Section, Her Majesty's Stationery Office, Room E22, Atlantic House, Holborn Viaduct, London, E.C.1, asking for the CATALOGUE SERVICE LEAFLET.

Some freight operators prefer to remain anonymous





We don't. There's no point, it seems to us, in being one of the world's largest containerised door to door export freight operators, if you can't boast a bit about your service at local level.

So we'd sooner you knew everything about us. Even the name of the man who runs our office in your area. For he's the one you'll be talking to about the equipment you need to shift your load, perhaps at very short notice.

And; whatever that load, the best route it can take from your door to your customers wherever they are in Ireland, in Scandinavia or anywhere in Continental Europe. He'll even tell you where your load is at any stage along its journey whenever you wish to know.

After all, it's not for nothing that, in twenty-one years, we've built one of the most efficient freight businesses as well as the biggest. Able to understand your problems down to the very last detail. All we need now is for you to put our claims to the test.

You'll find our name in your local phone book, and a person to person export freight opportunity at the end of the line.

Containerway

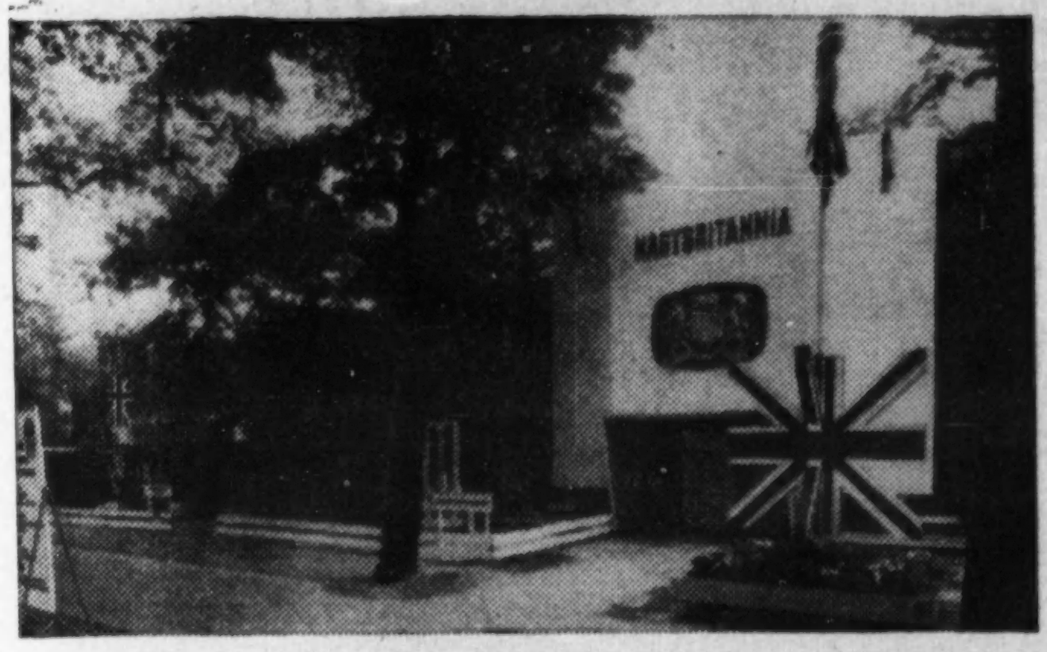
Containerway have a way with freight

there's an office in your area

Exhibitions and Fairs

Successful British participation in Budapest International Fair

A report from the British Embassy, Budapest



(Left) Britain's impressive national pavilion at Budapest. (Right) During the Budapest Fair a contract was signed by Morganite International Ltd. for the sale of a Unit B 'Compact' LP Diecasting Machine supplied by Heatlock Ltd. of Uxbridge, Middlesex – worth around £15,000. Purchasers were the Hungarian State Purchasing Organization Nikex, acting on behalf of Kis Motors of Budapest, manufacturers of generators and motors for lorries and other vehicles. It is believed that this is the forerunner of several further similar orders. Seen signing the contract on the Morganite stand are left to right: Mr. J. P. Butler, Morganite; Dipl. Ing. R. Kernacs, Nikex; Mr. E. P. Shimmerl, Morganite; and Mr. R. Prosser, Heatlock.

'More business activity and serious inquiries than at any previous Budapest Fair.' This comment by one of the British exhibitors reflected the view of nearly all the firms which took part in the official British display organized by the Board of Trade at the Budapest International Fair held from May 22 to June 1. Several firms also spoke of new orders related directly to their presence at the Fair – in one case amounting to over £100,000.

The opening of the 1970 International Fair was attended by the then President of the Board of Trade, who was the official guest of the Hungarian Government. After the opening ceremony, he visited the British pavilion for a personal discussion with each of the British exhibitors on their stands. Later in the morning he received the Hungarian Prime Minister, the Minister of Foreign Trade, and other Ministers at the British pavilion and conducted them on a tour of the British exhibits.

The British pavilion, an adjacent area outside, and an additional open site a short distance away, displayed the products of nearly 40 British firms. The exhibits included gas and electric welding equipment, textile and engineering machinery, electronic components, earthmoving equipment, diesel engines, scientific and laboratory instrumentation, medical equipment, materials handling machinery, and consumer items. The pavilion, which is well sited, was the same as last year and many visitors commented favourably on its appearance. The functional and uniform design of the stands contrasted to advantage with the diversified designs in some other pavilions. The exhibits in the open area adjacent to the pavilion were also set out in a manner which commanded attention. The separate open site housed the truck-mounted cranes of two British manufacturers which, with the Hungarian and British flags flying, towered above the whole exhibition area and served as a landmark for visitors approaching the fairground. Another eye-catcher was a massive container loader prominently displayed outside the pavilion and demonstrated periodically throughout the fair. Equipment for the use of disabled persons also attracted special interest and inquiries. Another firm, exhibiting at the fair for the first time, was able to make good progress in its plans for local manufacture under licence.

There was a strong feeling among the British exhibitors, shared by recent business visitors, that the developing Hungarian economy offers a potential for British firms which has not been sufficiently explored in recent years. The marked increase in British exports to Hungary during the first quarter of 1970 and the successful British participation in the Budapest International Fair should now give Anglo/Hungarian trade a new impetus. British firms are invited to discuss prospects in more detail with the Export Services Division of the Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757).

Emphasis will be on exports at International Gifts Fair

The International Gifts Fair at Earls Court, London, will be opened by Sir Peter Runge, chairman of the British National Export Council, on August 17.

Mr. P. H. Sweetser, managing director of Trade Promotion Services Ltd., and official organizer of the fair, said that he was confident that the number of companies participating would go beyond 400 before the opening date. 'A massive direct mail campaign to some 15,000 home and overseas buyers is already under way,' he said, 'and we are more than hopeful that London will attract new buyers, particularly from overseas.'

Mr. Elkan Simons, chairman of the Export Council for the Gifts Industry, also announced last week that the Council's own Award for Commendable Effort in Exporting would be presented to winning companies at the official luncheon at the fair. Referring to the purpose behind the award, Mr. Simons said, 'This is obviously not in any sense in competition with the Award to Smaller Companies being made by BNEC, but rather as part of the same encouragement to better our export figures. For our award, the volume of exports in itself is not necessarily the most important consideration. We are primarily concerned in recognizing, and thereby encouraging, the newer exporter who has of course to put in a lot of effort before both his own company, and indeed the country, can reap any reward.

'What our award scheme hopes to do is to persuade all British gift manufacturers to think urgently about the business of exporting, and give it a higher priority. Confined to the giftware industry, I am hopeful that our members will consider the award a worthwhile recognition and a prize worth achieving.'

ADVERTISEMENT INQUIRIES FOR THE JOURNAL

Inquiries concerning the insertion of advertisements in the Board of Trade Journal *should be addressed to HMSO, Room D92, Atlantic House, Holborn Viaduct, London, E.C.1* (01-248 9876, *Ext.* 6147).

500 retailers feature British goods in Tournai Shopping Week

Elizabeth Hartley, Board of Trade Information Division, reports from Tournai on June 15 on the opening days of this promotion.

IN COMMON with all British Shopping Weeks – promotions initiated by retailers overseas on their own account – the event that is taking place this week in Tournai is known locally as a British Week. For once the title is not misleading. This is a true British Week in all but size, scaled to fit a small city whose history and traditions of commerce and culture have been linked to Britain for many centuries.

This timeless city is firmly looking to the future, and is re-building its commercial life so that it may take the place in the markets of Europe that is implied by its geographical position as the gateway from France to Belgium. Tournaisiens see trade with Britain as an important factor in their resurgent commercial importance.

No visitor can doubt that the British are here. The main streets are submerged in Union Jacks and the red and gold of Scottish flags together with their counterparts from Northern Ireland and Wales, side by side with the Belgian tricolour and the city banners; shop after shop window carries the British Week cube symbol, royal portraits, mobiles and cut-outs, models of buses and guardsmen and police – all the festive paraphernalia that is so well known to us at home but is new and fresh and arresting to the Tournaisiens. There are two tall red buses – and a fine splash of colour they make against the background of Tournai's ancient buildings. There is the Alamein Staff Band of thte Royal Tank Regiment which plays every day in various parts of the city; there are pipers from Edinburgh and police from Lancashire, standing head and shoulders above the crowds, who as always are proving themselves to be the most popular of visitors.

Official opening

The British Shopping Week in Tournai was officially opened on June 11 by the Bourgmestre, Maitre Hachez, at an impressive ceremony in the new City Hall in the presence of the British Ambassador Sir John Beith, Lady Beith and leading members of the city authorities and commercial associations.

In a speech at the opening ceremony, the president of the Association, Générale des Commercants said that the Week had first been proposed by one retailer of the Rue Royale, but the proposal had eventually been taken up by the whole of the commercial community, and the city council had given valuable financial backing. The president paid a special tribute to the help that the organizers had received from the Commercial Department of the British Embassy throughout the preparatory months, which, together with complementary help from the Board of Trade and the splendid and varied display material sent out from London, had ensured success. The British Week, he said, was not a fairy story but a reality of great importance to Tournai.

Week of 11 days

Earlier, the British Ambassador referred to the warm welcome given by everyone in Tournai. 'Tournaisiens,' he said, 'will certainly be astonished to learn that an English week lasts for eleven days. With the English, you understand, "on en a pour son argent" (one gets value for one's money)'. Enumerating some of the exchanges that had taken place in the past between Tournai and England, Sir John said that common memories were not limited to wars and battles. The wool trade between Tournai and Britain was the oldest of many rewarding exchanges, and in the near future another direct link would be forged with the establishment of a vast new factory by Imperial Chemical Industries Ltd. at Peruwelz.

Considerable new buying

The commercial community of Tournai is not easily moved to enthusiasm for new products, and British goods were not much in evidence here before the Week began; yet prodigious efforts have been made to ensure its commercial success. Buyers from several stores have made personal visits to Britain to increase their stocks for the occasion. Grand Bazaar, whose main branch in Antwerp is putting on a British promotion this autumn, has bought a very considerable amount direct from Britain for both events. Another retailer visited Britain for the first time in order to get stocks for the Week, and placed a large order for leather and other goods at the Blackpool Giftware Fair. A third, who also made a special buying trip to London, bought antique and reproduction furniture to an estimated value of 1½ million Belgian francs (about £12,000).

Big increase

Initially some 350 shops were expected to take part in the Week, but in the event their number is nearer 500, and if in some of them the red, white and blue appears alongside goods from other countries, this is more than balanced by others who have given pride of place to those from Britain. Understandably, the three branches of Brussels stores that were so successful at that major British Week have the most impressive displays. There are foodstuffs and confectionery at Sarma and Unic (and at many other shops as well); foods and drinks, together with giftware, stationery and textiles at Grand Bazaar. But in addition there are windows filled with menswear made from British cloth and others showing British china, leatherware, books, and other goods.

The store displays are backed by numerous commercial activities whose variety is all the more impressive when it is remembered that all of them have been arranged by the shops or local agents of British firms. A special motor show, featuring 12 Austin, Ford, Triumph, Vauxhall and Sunbeam cars, opened on Saturday in the Place Lille where an enormous marquee had been erected to house them, together with an attractive small Bass bar. Watney has provided the British Week pub in the Grand' Place, built by Ayala Designs, as well as a large permanent pub, the opening of which was timed to coincide with that of the Shopping Week. Across the road from the motor show the regional Gas Company has mounted a display of British cookers and heaters by Potterton and Cannon (who also arranged demonstrations) designed for use with natural gas. The local electricity board also had an important exhibition of British domestic and industrial electrical appliances from several firms that are represented here.

Good coverage

The Week has been well covered by four local papers and there have been programmes devoted to it on Belgian radio and television. On the cultural side, there are exhibitions of British stamps and of works of Edward Paolozzi, the Scottish artist; a fine display of the Scottish Regalia; a performance by an experimental British theatre group; and a display and lecture on regional development. There will be a fashion show in the magnificent Halle aux Draps (the Cloth Exchange) organized by Courtaulds (Belgium) SA, compered by Belgian TV personalities.

Yet the commercial manifestations, however impressive, do not give a complete picture of the attitude of the Tournaisiens towards this 'peaceful invasion' from Britain. For most of the older people here, the liberation occurred yesterday. Small wonder then, that the visit of the Ambassador to the British and Belgian war cemeteries that followed the opening ceremony was a very moving occasion. Groups of people waited all along the route to salute his car, and the ceremony of the wreath-laying itself, followed by the playing of the Last Post, was a very real occasion for everyone present.

But in spite of all this evocation of the past, the business community of Tournai is by no means sentimental, and looks upon this British Shopping Week as an opportunity of increasing its trade in the competitive world of today. Tournai is the third Belgian city, following Bruges and Genk, to mount a British promotion since the major British Week in Brussels that was organized by the Board of Trade and the BNEC in 1967, and there is a possibility of more to come. Leaders of street associations that participated actively in Brussels and in Bruges are among Tournai's distinguished visitors this week – a sure sign of the lasting interest that these events have brought about.

Belgian retailers everywhere want to know more about the consumer goods that Britain has to offer today. The British Shopping Week in Tournai, as in other cities, provides a splendid opportunity of showing them.

The following late items of news were received on June 19. The fashion show was a complete sell out, and a wallpaper manufacturer announced that new accounts had been opened in Tournai as a result of the Shopping Week. Six hundred attended.

Foreign currency proves drawing power of London Stores Festival

THE THIRD Festival of London Stores – sponsored by the *Evening Standard* and the *Evening News* – has proved say the organizers, that this event is a leading London summer attraction for visitors from overseas, other parts of Britain, and for Londoners themselves.

In started enthusiastically when the huge crowds gathered around the West End to see the Grand Parade launch the Festival on Bank Holiday Monday. Then as the 28 participating stores did their sums, it emerged that the £6 million target figure for sales turnover during the fortnight had been exceeded by a handsome margin.

The chairman of the 1970 Festival Organizing Committee, Mr. Joselyn Stevens, said: 'The Festival exists to promote to the world that London is the greatest shopping scene in the world'. This the Festival appears to have done successfully. Round-the-world publicity has brought inquiries from many countries. Retailers, too, from the rest of Europe have been visiting the stores to see at first hand how it is all done. And, most important, there has been a noticable increase in the number of tourists seen in the stores, resulting in an impressive increase in the foreign currency taken in across-the-counter sales. At one store alone, Selfridges, 'some £200,000 in foreign currency was taken during the two weeks of the Festival' reported Mr. Edward McClean, the managing director.

At the recent Warsaw International Book Fair, Mr. David Bowen (standing), manager of the British Council display at the fair, shows some new publications to a visitor.

British Engineering Week Vienna: Britain's first capital goods promotion in Austria

A report from the Commercial Department, British Embassy, Vienna

NINETEEN SIXTY-NINE could be called 'British year' in Austria, with the visit of the Queen and members of her family in May, and the major British Week in Vienna in October. This created a very favourable atmosphere for Britain and brought home to Austrians that Britain took their country seriously as a nation and as a valuable market within EFTA.

The British Week was naturally directed at the public and consumer goods, but with industrial investment at a high level in Austria, there are also considerable opportunities for the sale of capital goods. It was in recognition of this fact and as a follow-up to the 'British year' that a British Engineering Week was held in Vienna from June 1-5.

As in previous Engineering Weeks, this event took the form of a programme of lectures and films and an exhibition. Of the 39 participants, 29 gave lectures or showed films and 31 exhibited. The London Chamber of Commerce and the Board of Trade planned the details from the London end and the Commercial Department of the Embassy prepared the ground in Vienna. The Week was held in the impressive modern premises of the Institute of Business Promotion of the Vienna Chamber of Commerce, ideally suited for such an occasion. This was made available free of charge by the Vienna Chamber and indeed many Austrian organizations went out of their way to co-operate in the arrangements for the Week. Sir Antony Part, Permanent Secretary at the Board of Trade, visited Vienna for the official opening of the Week, which was performed by Dr. J. Staribacher, Austrian Minister of Trade, in the presence of about 200 invited guests from all the important sectors of Austrian economic life. Both Sir Antony and the Minister made speeches which were widely reported in the Austrian press.

Exhibits and lectures were directly connected with those fields of industry which are contributing most to Austria's economic growth at the moment. These included the machine tool, petro-chemical, paper, plastics and steel construction industries; apart from special equipment for these industries, the control instruments, valves and hydraulic and pneumatic systems which go with them were also featured.

The lecture programme also included the bonus of several lectures on advanced technological subjects, all of which were very well attended: Prof. P. H. Stephenson of the Birniehill Institute for Advanced Machine Tool and Control Technology covered the field of machine tools in the 1970s; Morganite Modmor Ltd. talked about carbon fibre, and the British Post Office lectured to a full house on satellite communications and the construction of earth stations, which has enabled British experience and capabilities in this field to be brought home to those Austrians who are just beginning to consider the prospects of constructing their own station.

A small but highly specialized audience attended lectures by The Borden Chemical Co. (U.K.) Ltd., whose participation in the Week led to arrangements for detailed tests on their materials with the department of the Vienna municipality constructing the new underground railway. An equally small but specialist audience attended the lecture by Tiltman Langley Ltd.: although the Vienna municipality had already chosen another system of passenger control and fare collection for the underground railway, another city's authorities expressed interest in this firm's equipment for use on public road transport. Moreover, until Tiltman Langley came to Austria they had only considered transport authorities as potential customers. They now also have the possibility of sales to ski-lift operators.

One or two exhibitors did not get everything they would have liked from the Week, although it is, of course, too early yet to assess its full effect; but the general feeling was

Serious discussion on the Adcock & Shipley stand during the British Engineering Week in Vienna.

undoubtedly one of satisfaction, with firms making or cementing contacts with those manufacturers or operators who are the most important customers in highly specialized fields.

This Engineering Week was the first of its kind in West Europe and, for Austria, was an effective means of bringing sophisticated techniques and equipment directly to the user's attention and of demonstrating the seriousness with which British manufacturers consider the Austrian industrial market. It should help to prove to Austrian industry that to carry out their wish of breaking the habit of automatically looking to the Federal Republic of Germany for their supplies, they can turn with confidence to Britain for their needs. British firms should not be complacent about this; the Week must be regarded as part of a continuing campaign.

Joint venture at Hotel '70 Johannesburg

A report from the British Consulate-General, Johannesburg

NINE British firms exhibited at Hotel '70, the new Hotel and Catering Exhibition, held in Johannesburg between May 11-14 with British participation organized as a joint venture sponsored by the London Chamber of Commerce and the Board of Trade, in conjunction with the Central Office of Information.

The exhibition, which was officially opened by Mr. Leon Malan, director of the South African Hotel Board, embraced all aspects of the hotel and catering industry within three exhibition halls. The British section, situated in a prime position adjacent to the main entrance, evinced an imaginative approach in design within the overall context of the exhibition. Participating companies exhibited a wide range of products including carpets, frozen foods, furnishing fabrics, glass washing machinery, a new concept of notice boards, hotel tableware and cutlery.

Britain was the only country with its own national group, and exhibitors were encouraged not only by a visit from the British Ambassador, Sir Arthur Snelling, but also by the many favourable comments from members of the hotel industry throughout the Republic who visited their displays. Individual exhibitors from outside South Africa came from Italy, Germany, Spain, Holland and Lesotho.

Exhibitors in the British group were not only well satisfied with the immediate results which they had been able to achieve during the exhibition, but were also delighted with the prospects for the immediate and long term. One described the prospects for his goods as 'tremendous.'

Attendance was, in the main, restricted to the hotel trade and whilst a count of visitors was not taken, exhibitors were reasonably satisfied that the exhibition had drawn a good cross-section of buyers from important groups and individual hoteliers throughout the Republic. It is envisaged that a similar exhibition will be staged in two years' time.

Didacta 1970, Basle—'a British success'

A report from the British Embassy, Bonn

THE 10th European Educational Materials Exhibition ('Didacta' 1970) was held in Basle, Switzerland, between May 28 and June 1. 827 firms in the educational materials field were exhibiting from 30 countries all over the world. This was a record number of exhibitors, almost 160 more than participated in Didacta 1968. By the time the exhibition closed, 88,600 visitors had passed through the doors, creating another record for this event.

On 1,800 sq. metres of exhibition space an attractive display site had been erected for the joint venture exhibition organized by the Educational Equipment Association, the British Publishers Association, the British Council for Educational Technology and Training and the Board of Trade. The joint venture stand was a strong attraction to visitors, who came not only from Switzerland but also from most other West and Eastern European countries, from North and South America, from the African continent and from places as far apart as the Arab States of the Gulf, Singapore and Australia.

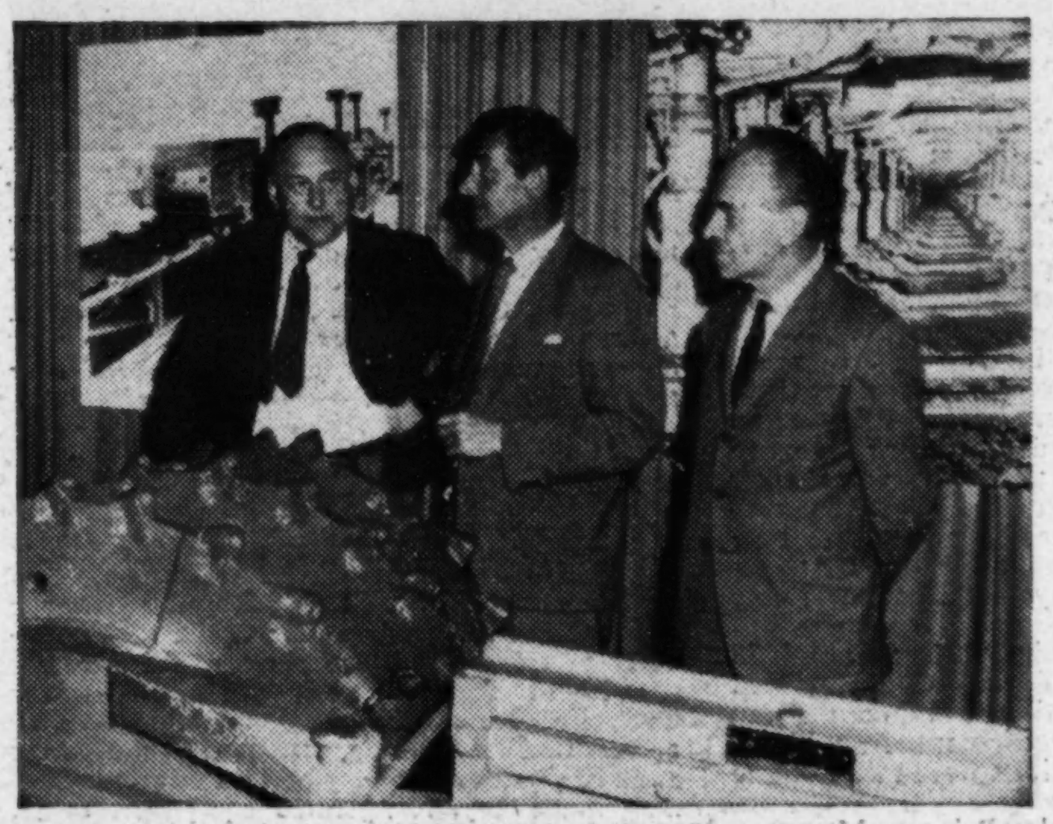
Participating in the joint venture were 40 British firms with their own stands; and a further 19 firms exhibited from a group stand, in all 65 British firms plus a representation by the Department for Education and Science. This happy combination of official and commercial participation in Didacta ensured that visitors could study the latest advances in school building and furniture design, and of course the latest trends in British education, and gain the benefit of first-class commercial advice from the participating British firms.

Our representatives summed up the results of their participation as being excellent. Indeed many of them said that by mid-day on the second day of the exhibition, such had been the influx of visitors and the number of serious inquiries received that their hopes had already been fulfilled. By the end of the exhibition those firms which had been looking for agents had received offers well worth following up, and others had made many interesting new contacts.

One of the highlights of the exhibition was the reception given by the Educational Equipment Association to guests from the Swiss educational press, education authorities, schools and universities, etc., at which Mr. William Bramhall, the organizer and hon. treasurer of the association, briefly spoke on the aims and objectives of the EEA at Didacta.

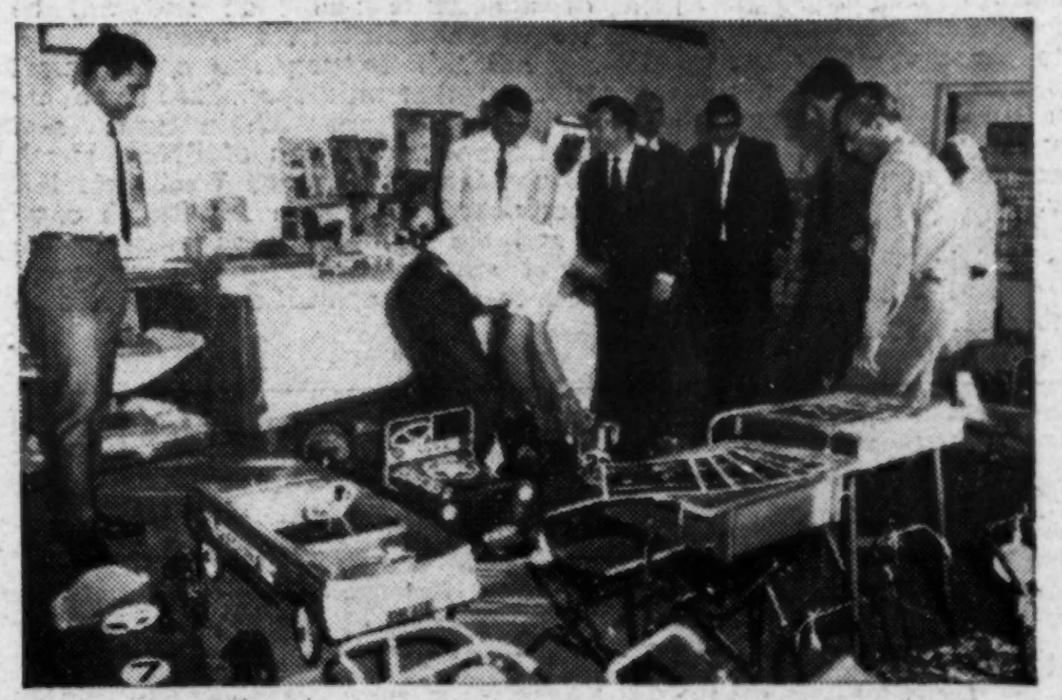
Didacta 1970 was a British success. Our participants are already looking forward to the next joint venture.

The British joint venture stand at Didacta, Basle, attracted crowds of visitors of all nationalities.



During his visit to the American Mining Congress in Cleveland last month Lord Robens, chairman of the National Coal Board, made a point of going to see the special show staged by the Dowty Mining Corporation, who despite the cancellation of the main Coal Show, managed to display their products. Picture shows (left to right): Lord Robens; Mr. S. Hinchliff, director, Dowty Group Ltd.; and Mr. Fred W. W. Murray, HM Consul (Commercial).

Two furniture buyers from the Odakyu Department Store, Tokyo, visited The Design Centre, London, during a tour of British furniture manufacturers. Odakyu is to put on an exhibition of modern British furniture in October, and during their trip to Britain they bought a number of items which will go on display and may lead to larger export orders later on. Picture shows Mr. Mitsuya and Mr. Yoshioka examining an armchair on display at The Design Centre.



Mr. Samuel Falle, British Ambassador in Kuwait (third from left), visits an exhibition of toys manufactured by Lines Brothers Ltd.'s Tri-ang Pedigree and Rovex Tri-ang divisions. The exhibition was held on the premises of the Kuwait Maritime and Mercantile Company, who have represented these divisions of Lines Brothers for a number of years. In the first four days orders worth £15,000 were taken, more than the total sales of Tri-ang Pedigree and Rovex Tri-ang toys during 1969.

INDEX INQUIRIES

Inquiries about the detailed contents of the JOURNAL *(dates on which particular articles, etc., were published) should for convenience be made to the Board of Trade Library* (01-222 7877, *Ext*, 3038) *who compile the half-yearly index to the* Journal.

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Antiques valued at £8 million under one roof

AT THIS YEAR'S Antique Dealers Fair and Exhibition staged at London's Grosvenor House (June 10-25), the rising cost of antiques was much in evidence. So much so, that it might have seemed to the casual visitor that if he had the money to spend here was an investment which would undoubtedly produce a rich dividend.

It was estimated that under this one roof articles valued in excess of £8 million were on display.

This might suggest that only the very rich can reasonably hope to accrue good collections of furntiure, silver, pictures, and other items.

Not so, it seems, judging by what one Glasgow furntiure store has done, which in itself may well be the start of a new buying trend. Those canny Scots have, it seems, found a way of bringing antiques within the reach of more and more people, especially young families, by offering hire purchase terms.

Highlights of this year's fair were items from the Royal collections – The Queen, The Queen Mother, and the Duke of Gloucester.

The Queen loaned an equestrian figure of William III – a late 17th or early 18th century piece in patinated bronze. The figure, crowned by Victory, is represented leaping over a fallen foe. The ebony base on which the group stands is decorated with gilt bronze enrichments which include low relief scenes, and plaques whose Latin inscription record William III's accession to the throne and his victory over opposing Irish and Scottish forces.

There are known to be a number of groups closely related to this one but depicting other monarchs. It is thought by experts that this figure and two others representing George I and Louise XIV of France were made in the same workshop, possibly by a Frenchman established in England.

The Queen Mother, who is a patron of the fair, sent a pair of silver flintlock pistols made in 1823 by H. W. Mortimer, a Royal Warrant Holder of the time and maker of blunderbusses for Royal Mail coaches. His business was at 89 Fleet Street, London. The pistols are believed to have belonged to George IV and bear the royal coat of arms.

The Duke of Gloucester's exhibits consisted of two rectangular cabinets with 10 drawers each and removable fronts of multi-coloured lacquer. The front, sides, back and top of one are decorated with flowering plants among rocks surrounded by interlacing scrolls. The companion cabinet is similarly decorated with phoenixes and lotus scrolls.

Westminster City Council and the Worshipful Company of Goldsmiths loaned a number of rare items. The City Council lent their silver-gilt mace which was originally given to the Court of Burgesses by its High Steward, Charles Butler, Earl of Arran, in 1726. The mace head comprises an exceedingly fine piece of carving. It is divided into four panels containing the arms of the Dean and Chapter of Westminster, the arms of the City of Westminster (two panels) granted in 1601, and the arms of Butler himself who was High Steward of Westminster from 1715-1758.

The crown surmounting the mace head contains the Royal Arms of England impaling Scotland, France, Ireland and Hanover. The letters GR on either side of the crown represent George I.

The Westwell Livery Pots, lent by the Goldsmiths Company, date from 1549 and 1597. They were presented to Westwell parish church near Sittingbourne, Kent, by George Baker, Lord of the Manor of Ripple, in 1630.

Although they differ in date and in small details of appearance, they are clearly intended as a pair. Similar examples of Elizabethan flagons may be found in some English churches having been presented when their owners began to regard them as too old-fashioned for use at table. Flagons of this type are of secular origin and there are others in the possession of City of London livery companies.

The fair, established in 1934, attracted 78 leading British antique dealers who displayed every category of antiques, ranging from snuff-boxes to military equipment. As with all genuine antiques, all exhibits were made before 1830.

The fair was opened by Princess Margaret.

Proprietary Perfumes Ltd., have just returned from 'a very satisfactory' visit to Moscow where they presented a scientific symposium and display to leading Soviet perfumers. Picture shows Mr. G. H. Roberts, marketing director, talking to representatives of Soviet perfumery houses as they assess product samples containing PPL perfumes.

British Agricultural and Food Exhibition for Israel

IN THE autumn of 1971 it is hoped to stage a major British Agricultural and Food Exhibition in Tel Aviv. This will be organized by the Board of Trade and produced by the Central Office of Information and will cover agricultural machinery, irrigation equipment including pumps, packaging, grading and canning machinery, refrigerated equipment of all types from harvesting to cold storage including refrigerated transportation by land, sea and air and agricultural building and plant protection.

Prospective exhibitors will have the benefit of a market research survey now being carried out in Israel. Commissioned by BNEC Israel, it covers opportunities for the entire field of agriculture and food and will be published within the next few weeks.

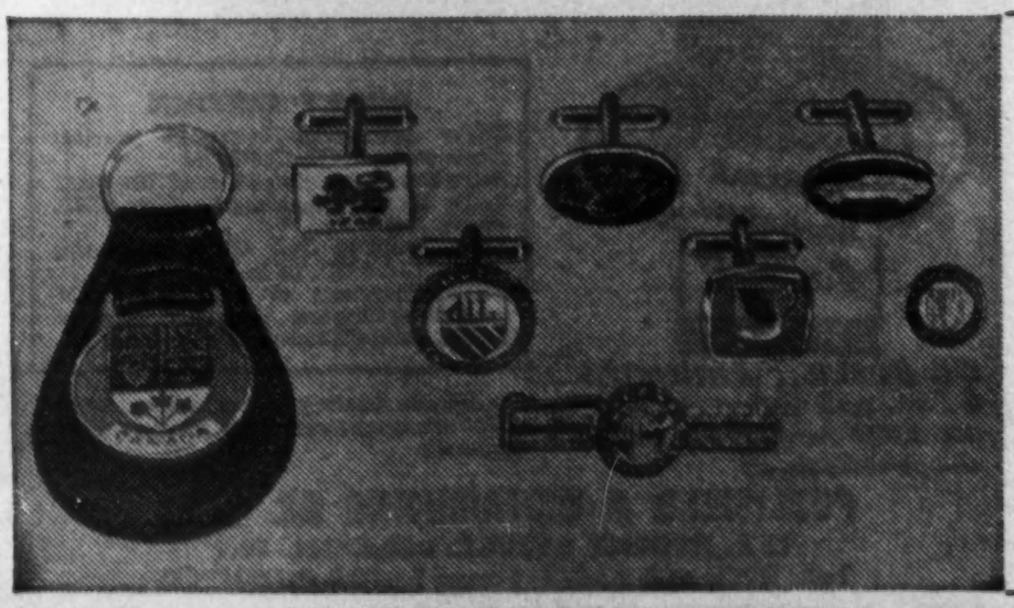
Both the British Embassy and BNEC Israel are convinced that this specialized type exhibition is the best approach in Israel', said Mr. Jan Lewando, chairman of BNEC Israel, in Tel Aviv. 'The Engineering Week held last December netted £3 million for British companies, and the potential is as great in the agricultural sector where Israel requires all the labour-saving equipment she can afford to buy.'

Metric products exhibition at Building Centre

FOR THE last 11 years The Building Centre has been holding bi-annual exhibitions of new materials. This year, as the construction industry is in the process of going metric, the exhibition will be centred around the changeover, and all products on show will be designed to metric dimensions.

The purpose of the exhibition, the first of its kind, will be to bring to the attention of the construction industry the metric products marketed so far, and to encourage their use in future projects. It is also hoped that the variety of products on display from many different product groups may encourage the acceleration of the present rate of progress in the changeover to metric.

The exhibition will be held in The Building Centre's exhibition gallery and will run from November 23 to December 11.



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Overseas Trade and Exports

TRADE AND FINANCIAL ARRANGEMENTS

United Kingdom/Japan fast reactor agreement

AN AGREEMENT was signed in London on June 15, between the Japan Atomic Energy Research Institute (JAERI), the Power Reactor and Nuclear Fuel Development Corporation (PNC) and the United Kingdom Atomic Energy Authority (UKAEA), for the exchange of information and collaboration on liquid metal cooled fast reactors.

The agreement provides for balanced exchanges of research and development information in a number of selected fields relevant to the development of fast reactors, but excludes information directly relating to commercial power fast reactors and their fuel.

The selected fields of exchange include the properties of materials used in fast reactors, reactor physics, the design and performance of fuel, design and operating experience of fast reactors, reactor safety and management experience, and techniques relating to sodium loops.

The information shall be exchanged by reports, visits, meetings, attachments of personnel and other means.

The agreement, which comes into force at once, will run until the end of 1975. It replaces an earlier agreement between the UKAEA and JAERI entered into in 1965.

The signatories were Dr. Eiji Munekata, president of the Japan Atomic Energy Research Institute; Mr. Goro Inouye, president of the Power Reactor and Nuclear Fuel Development Corporation; and Sir John Hill, chairman of the United Kingdom Atomic Energy Authority.

Trade and investment opportunities in Hong Kong

SPEAKING AT THE Hong Kong Association's first dinner, held in London earlier this month, Mr. Jeffrey Hamm, chairman of the Committee of the Association, referred to the 'economic miracle' of progress made in Hong Kong since the war and urged British interests not to miss the opportunities offered for trade and investment.

He said: 'British industry has been slow to take advantage of all that Hong Kong has to offer, with the result that the Hong Kong waterfront is ablaze at night with neon signs advertising American, Japanese and other countries' wares, but there are few such signs advertising British firms or British products. This is a greaty pity. I can only put out the appeal: why not have a close look at Hong Kong? It is a dynamic, enterprising and stimulating place.'

The dinner was attended by some 260 prominent merchants, industrialists and bankers, all with trading connections with Hong Kong, and officials from Government departments.

The guest of honour was Earl Mountbatten of Burma, who spoke of the tremendous growth of the Colony since the war achieved by hard work and intelligent leadership both in Government and industry.

Sir Antony Part, Permanent Secretary, Board of Trade, and Mr. William Hughes, Second Secretary, were among the guests.

Tunisia and Spain

THE TUNISIAN *Journal Officiel* of May 15, 1970, announced the renewal for a further year from April 1, 1970, of the trade agreement of 1961 between Tunisia and Spain.

Details of quota arrangements can be obtained from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 459/460/462).

Tunisia and Bulgaria

THE TUNISIAN *Journal Officiel* of April 28-May 1, 1970 announced the signing on February 13 of a protocol to the trade agreement of 1964 between Tunisia and Bulgaria.

Bulgarian exports to Tunisia will include chemical and pharmaceutical products, iron and steel products, foodstuffs, textiles, cattle and sheep for slaughter.

Tunisian exports to Bulgaria will include cork, citrus fruits, dates, olives, phosphates and iron and steel products.

Details of quota arrangements can be obtained from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 466/467/482).

Tunisia and Japan

THE TUNISIAN *Journal Officiel* of May 15, 1970, announced the renewal for a further year from April 1, 1970 of the trade agreement of 1960 between Tunisia and Japan.

Tunisian exports to Japan will include agricultural products and minerals. Japanese exports to Tunisia will include machinery and consumer goods.

Details of quota arrangements can be obtained from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 475/420).

Tunisia and South Vietnam

THE TUNISIAN *Journal Officiel* of April 28, 1970, announced the renewal for a further year from May 10, of the trade agreement of 1966 between Tunisia and South Vietnam.

Tunisian exports to South Vietnam will include agricultural products, minerals and manufactured goods. South Vietnamese exports to Tunisia will include mainly natural products.

Details of quota arrangements are available from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 420 and 475).

(*Continued on next page*)

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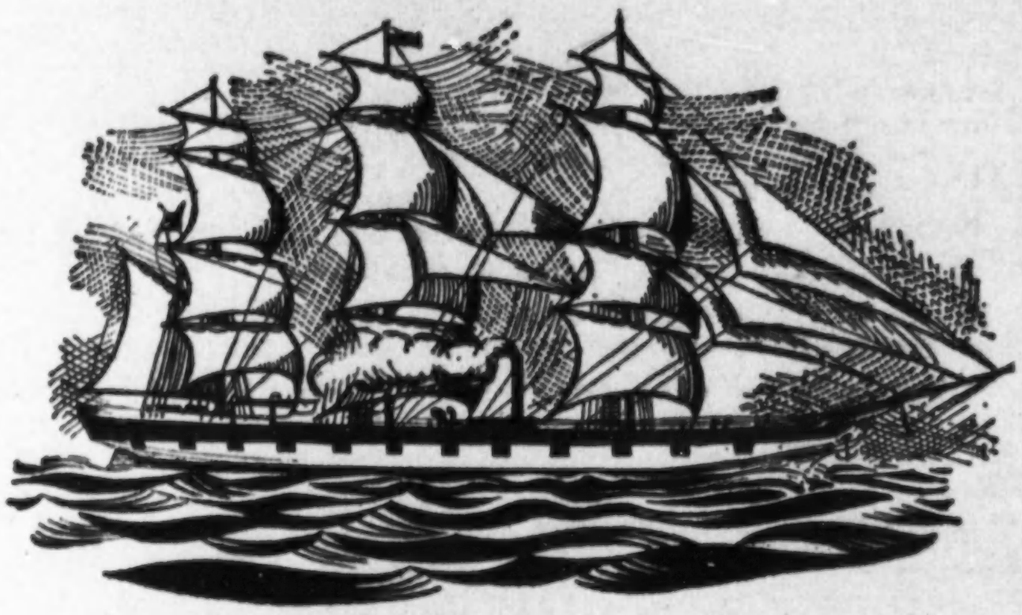

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Tunisia and Sweden

THE TUNISIAN *Journal Officiel* of May 12, 1970, announced the renewal for a further year from April 1, 1970, of the trade agreement of 1960 between Tunisia and Sweden.

Details of quota rarangements can be obtained from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 456/460/462).

Tunisia and Norway

THE TUNISIAN *Journal Officiel* of April 24, 1970, announced the renewal for a further year from April 1, of the trade agreement of 1960 between Tunisia and Norway.

Details of quota arrangements are available from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 459/460/462).

Ecuador and Poland

A TRADE AGREEMENT was signed in Quito on March 20 between the Governments of Ecuador and Poland. The main provisions of the agreement are listed below.

The contracting parties will mutually grant most favoured nation treatment, except in those cases where they have conceded specia advantages to neighbouring countries, enjoy advantages resulting from customs unions and have granted concessions to third countries by virtue of participation in free trade zones and/or regional or sub-regional agreements.

Poland is to export machinery, industrial equipment and spare parts necessary for Ecuador's economic development, while Poland agrees to continue to take Ecuador's traditional produce and, so far as possible, manufactured and semi-manufactured articles. Re-export of any items imported is prohibited except with prior agreement of the exporting country.

Exchange of goods under the agreement shall be expressed in United States dollars.

The contracting parties agree to the setting up of a Joint Commission to ensure the satisfactory operation of the agreement.

The agreement shall be effective for two years, whereafter it will be automatically renewed for yearly periods unless terminated by three months notice before the end of a yearly period.

Inquiries relating to this agreement may be addressed to Commercia. Relations and Exports Department, Board of Trade, Room 355, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2288).

France and Albania

THE FRENCH *Moniteur du Commerce International* of May 28, 1970, announced that a new Trade Agreement between France and Albania for the period January 1 to December 31, 1970, was signed at Tirana on May 11, 1970.

French exports to Albania will include breeding stock, industrial oils and lubricants, hides and skins, artificial and synthetic fibres and yarns, iron and steel including construction materials, tin, agricultural machinery and equipment and industrial equipment.

Albanian exports to France will include tobacco, pigmeat, copper cable, raw hides and carpets.

Details of quotas in French can be seen at the Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 482).

Hints to businessmen visiting Uganda and Rwanda

A REVISED EDITION of the booklet on Uganda and Rwanda has been published in the 'Hints to Business Men' series.

British businessmen who intend visiting this country on export business can obtain a copy of the booklet on application to Export Services Division, Board of Trade, Room C07, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 7146), or to any Regional Office of the Board of Trade, or on personal application to the Export Information Centre, Board of Trade, 50 Ludgate Hill, London, E.C.4.

Tariff, Customs and Import Regulations in overseas countries

REGISTERED TRADE MARK (RTM) GOODS IN OVERSEAS TARIFF LIST.

The lists of Tariff, Customs and Import Regulations changes in overseas countries published in this section of the Journal *sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view.*

Items which fall into this category will now be preceded by the letters 'r t m'. Readers of the Journal *should note that this prefix signifies that the words are registered as trade marks in the United Kingdom, but that in the present context they are assumed to refer generally to products of the description stated in brackets.*

While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

EUROPEAN COMMUNITIES

Common agricultural policy

THE TEXTS of the following Regulations and Proposed Regulation which affect the various agricultural sectors in the EEC have been published in the *Journal Officiel des Communautés Européennes.*

The French text of the Regulations and Proposed Regulation may be seen on application to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 7174).

CEREALS

Regulation (CEE) No. 1083/70 fixes a compensatory indemnity for soft wheat, rye of a bread making quality and maize in stock at the end of the 1969/1970 Marketing Year (*Journal Officiel* No. L127 dated June 11, 1970).

Regulation (CEE) No. 1084/70 fixes a compensatory amount for durum wheat and barley in stock at the end of the 1969/1970 Marketing Year and intended for export (*Journal Officiel* No. L127 dated June 11, 1970).

Regulation (CEE) No. 1092/70 completes **Regulation (CEE) No. 1403/69** in so far as it concerns the denaturation by the addition of fish oil, of soft wheat and rye for bread making (*Journal Officiel* No. L127 dated June 11, 1970).

PROCESSED AGRICULTURAL PRODUCTS

Regulation (CEE) No. 1082/70 modifies **Regulation (CEE) No. 1671/69** relating to certain measures to be taken for goods covered by **Regulation (CEE) No. 1059/69** following the devaluation of the French Franc (*Journal Officiel* No. L127 dated June 11, 1970).

FRUIT AND VEGETABLES

Regulation (CEE) No. 1091/70 fixes the coefficients of adaptation to be applied to the purchase price specified for peaches by **Regulation (CEE) No. 969/70** (*Journal Officiel* No. L127 dated June 11, 1970).

WINES

Regulation (CEE) No. 1093/70 concerns the addition of alcohol to products in the wines sector originating in the Community (*Journal Officiel* No. L128 dated June 12, 1970).

MILK AND MILK PRODUCTS

Regulation (CEE) No. 1094/70 establishes the general rules for applying Article 11 and Article 12 para 1. of **Regulation (CEE) No. 1975/69** setting up a premiums system for the slaughter of dairy cows and for the non-marketing of milk and milk products (*Journal Officiel* No. L128 dated June 12, 1970).

HONEY

The *Journal Officiel* No. C69 dated June 11, 1970 contains an announcement about a Proposed Regulation concerning the production and marketing of honey. It should be noted that the text of this Regulation when finally approved may differ from the draft text referred to above.

SUGAR

Regulation (CEE) No. 1068/70 completes the Annex of **Regulation (CEE) No. 2061/69** in so far as it concerns the processes for the denaturation of sugar (*Journal Officiel* No. L123 dated June 6, 1970).

OILS, FATS AND OILSEEDS

Regulation (CEE) No. 1069/70 modifies **Regulation (CEE) No. 560/70** in so far as it concerns the publication of the notices for selling olive oil held by the Italian Intervention Organization (*Journal Officiel* No. L123 dated June 6, 1970).

Harmonization of legislation

THE *Journal Officiel des Communautés Européennes* No. C69 dated June 11, 1970 contains the text of a Proposed Directive relating to the harmonization of Member States legislation concerning the development and marketing of natural mineral waters.

(*Continued on next page*)

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EUROPEAN COMMUNITIES, *continued*

It should be noted that the text of this Directive when finally approved may differ from the draft text referred to above.

The French text of the Proposed Directive may be seen on application to the Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 7174).

Tariff quotas in the EEC

THE *Journal Officiel des Communautés Européennes* No. L126 dated June 10, 1970 contains the text of **Regulation (CEE) No. 1075/70** setting up a Community tariff quota for 46,000 tonnes of herrings, fresh, frozen or chilled, whole, headed or in pieces (Common Customs Tariff No. 03.01 B I (a) 2 (aa)) at a 'nil' rate of duty for the period June 16, 1970 to February 14, 1971. 40,760 tonnes of this quota have been allocated on the following basis:

Germany	32,800 tonnes
France	1,000 tonnes
Italy	40 tonnes
Netherlands	5,120 tonnes
Belgo-Luxembourg Economic Union	1,800 tonnes

The remaining 5,240 tonnes will form a reserve available to Member States who use 90 per cent or more of their original allocation. Details of the method of allocation and of the conditions attached to the whole quota may be obtained on application to the Export Data Branch at the address given below.

The *Board of Trade Journal* dated January 21, 1970 contained an announcement about **Regulation (CEE) No. 2610/69** setting up a Community tariff quota of 1 million uc (uc=unite de compte-present value 1 US dollar) each for silk and silk waste (schappe) woven on hand looms (Common Customs Tariff No. ex 50.09) and cotton, woven on hand looms (Common Customs Tariff No. ex 55.09). The *Journal Officiel des Communautés Européennes* No. L126 dated June 10, 1970 contains the text of **Regulation (CEE) No. 1076/70** modifying Article 1 of **Regulation (CEE) No. 2610/69** in so far as it concerns certificates of origin.

The French texts of the Regulations referred to may be seen on application to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 7174).

FRANCE

Customs work-to-rule

THE RECENT work-to-rule being operated by French Customs officials at ports dealing with freight is now over (see *Board of Trade Journal* of June 17, page 1590). It is estimated that it will take eight to 10 days to clear the backlog.

IRISH REPUBLIC

Claims to United Kingdom preference for certain chairs and other seats

THE REVENUE COMMISSIONERS in the Irish Republic have issued a notice (Note No. 1125) drawing attention to the fact that the following special requiremnts apply to chairs and other seats coming under the Tariff Heading No. 94.01 (A)(5)(a) and chargeable with the preferential rate which at present is 20 per cent and applicable to goods of United Kingdom origin.

Chairs and other seats entered at the above Tariff Heading No. will not be admitted at the United Kingdom preference rate of duty unless a Certificate of Origin on Form Cu 166 is produced with a declaration by a principal official of the manufacturer of the goods in the United Kingdom, in the following terms:

'I declare that I am duly authorized to give this Certificate and I certify that the.....(specify goods) described on the attached Certificate of Origin—

(A) Were not imported into the United Kingdom from outside the Anglo-Irish Free Trade Area in an assembled condition for upholstering or any other finishing process or processes in the United Kingdom.

(B) Were not manufactured in the United Kingdom from frames imported from outside the Anglo-Irish Free Trade Area.'

The declaration should be attached by the declarant to the Cu 166, otherwise the full rate will have to be paid before admitting the goods unless a duty-free licence is produced.

The arrangements with the Association of British Chambers of Commerce whereby a Certificate of Origin on form Cu 168 furnished by an authorized British Chamber of Commerce will be accepted in support of claims to United Kingdom preference as an alternative to a manufacturer's certificate is suspended in respect of chairs and other seats classified at Tariff Heading No. 94.01(A)(5)(a).

SWITZERLAND

Import of rennet casein

THS SWISS Federal Department of Finance and Customs has ordered that, with effect from June 15, 1970, the Order of June 4, 1969, concerning the differential treatment of goods according to use is modified as follows:

Article 2. The import, at the favoured rate of duty of 2 francs per 100 kg gross, of rennet casein (No. 3501.10 of the Customs tariff) will be limited to 150 tons per year (lactic year) and per consumer.

This regulation is applicable to the current lactic year 1969/70.

Inquiries about this notice should be addressed to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 459/460).

DETAILED STATISTICS OF UNITED KINGDOM OVERSEAS TRADE

Each month the Overseas Trade Statistics give a considerable amount of detail about United Kingdom imports, exports and commodities and, for many of them, the most important countries of consignment,

The information in these statistics is, in fact, a summary of much more detailed information. This is derived from declarations made by traders to HM Customs and Excise under the descriptions in the Tariff and Overseas Trade Classification (which has about 6000 commodity headings); there are 188 specified countries for consignment.

The fully detailed information is not published on a monthly basis but, when circumstances allow, HM Customs and Excise can supply detailed information about trade under individual descriptions of the Tariff and Overseas Trade Classification and with individual countries or through United Kingdom ports, either for particular months or for longer periods. A charge is made which covers the cost of the service. Applications should be made to the Statistical Office (Bill of Entry Section), HM Customs and Excise, 27 Victoria Avenue, Southend-on-Sea, Essex, SS2 6AL (Tel. Southend (0702) 49421, Ext. 316 or 323 for Imports, or Ext. 314 or 315 for Exports, Telex 99112 CUSEX Southend).

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Government control of the import trade

A STATUTORY INSTRUMENT, the Export and Import (Authorization) (No. 2) Order 1970, has now been published in Uganda which gives effect to the new import system described in our notice which appeared in the *Export Intelligence Service* on June 10 and the *Board of Trade Journal* on June 17.

This Order authorizes any person who was importing any goods for the purposes of trade immediately before May 29, 1970, to import goods of any class or description for the purposes of trade, subject to the condition, however, that goods in the following list may not be imported without written consent from the Export and Import Corporation:

1	Milk and cream (tinned)
3	Rice
5	Sugar
6	Wines
7	Ale, beer, cider and stout
8	Brandy, gin, geneva, whisky and rum
9	Liqueurs and mixed potable spirits
12	Salt
22	Chemical and other compounds
23	Paints, varnishes and related materials
24	Medicinal and pharmaceutical products
25	Soap and perfumery
26-27	Fertilizers, insecticides, fungicides, etc.
28	Tyres and tubes
30	Papers
31-32	Cotton fabrics
33	Jute bagging
34	Synthetic fibres, fabrics of
35	Jute sacks
36	Blankets
38	Non-metallic mineral manufactures
39	(a) Iron and steel bars, pipes, etc
41	Other metals and manufactures of metal
42-43	Tractors and agricultural machinery
44	Office machines
45	Sewing machines
46	Machines other than electric
47	Television sets
48	Wireless sets and radiograms
51	Passenger cars
52	Lorries and buses
54	Other transport equipment
55	Clothing, khangas, saris, etc.
56	Other clothing
57	Footwear
58	The importation of the following woven fabrics: (a) Item Code No. 653 1 00, silk fabrics (b) Item Code No. 653 2 00, woollen fabrics (c) Item Code No. 653 3 00, linen fabrics

Note: Numbers mentioned in this Schedule (except 58) relate to those stated in Table 1 of the Annual Trade Report of Tanzania, Uganda and Kenya.

Under further provisions of this Order the following companies and organizations are authorized to import goods, other than goods for manufacturing purposes:

Name	Goods to be imported
Dairy Corporation	Milk, cream, butter and ice cream, ghee (clarified butter) and cheese, dairy farm equipment
National Housing Corporation	Machinery for building and road construction works
Uganda Electricity Board	All goods required for their electrical engineering and maintenance works
Kampala and District Water Board	All goods required for the Board's water works
Makerere University College	All specialized equipment and books required for teaching and research; books and stationery supplies for the University Bookshop
Agip (Uganda) Ltd. B.P. (Uganda) Ltd. Caltex Oil (Uganda) Ltd. Esso Standard (Uganda) Ltd. Mobil (Uganda) Ltd. Total (Uganda) Ltd. Uganda Shell Ltd.	Oil and petroleum products; materials and equipment required for the oil industry
Religious Organizations	Altars, fonts and pulpits, stained glass windows, altar bread and communion wafers, sacramental wine, altar linen and vestments, bells, organs and blowers therefore and harmoniums and parts or accessories thereof for use in the conduct of religious services
Charitable and Voluntary Organizations Technical Assistance Organizations Registered Civil Mechanical and Electrical Engineering Firms Uganda School Supply Ltd.	Specific imports to be approved by the Minister

The import licensing position at the present moment is not clear, though it is assumed that licences are still required for the same goods as previously. Clarification of this is expected soon and another notice will be issued. The National Trading Corporation, the Government organization which held an import monopoly for certain goods, has now ceased to have authority to import or export.

Any inquiries about this notice should be addressed to Export Services Division, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 471/2/3).

Two senior Ethiopian government officials recently visited the Telford tractor-shovel factory of the construction equipment division of Eaton Yale and Towne to discuss problems in planning, building, manning and operating a factory in a new town. In the picture (left to right): HE Mr. Bekele Endeshaw; Mr. Malcolm Goody, manufacturing director of the Eaton Yale and Towne construction equipment division; Mr. Ashenafi Shifferaw; Mr. Ed Hilton III, the division's managing director; and Mr. Isiah Jones, deputy charman of Telford Development Corporation.

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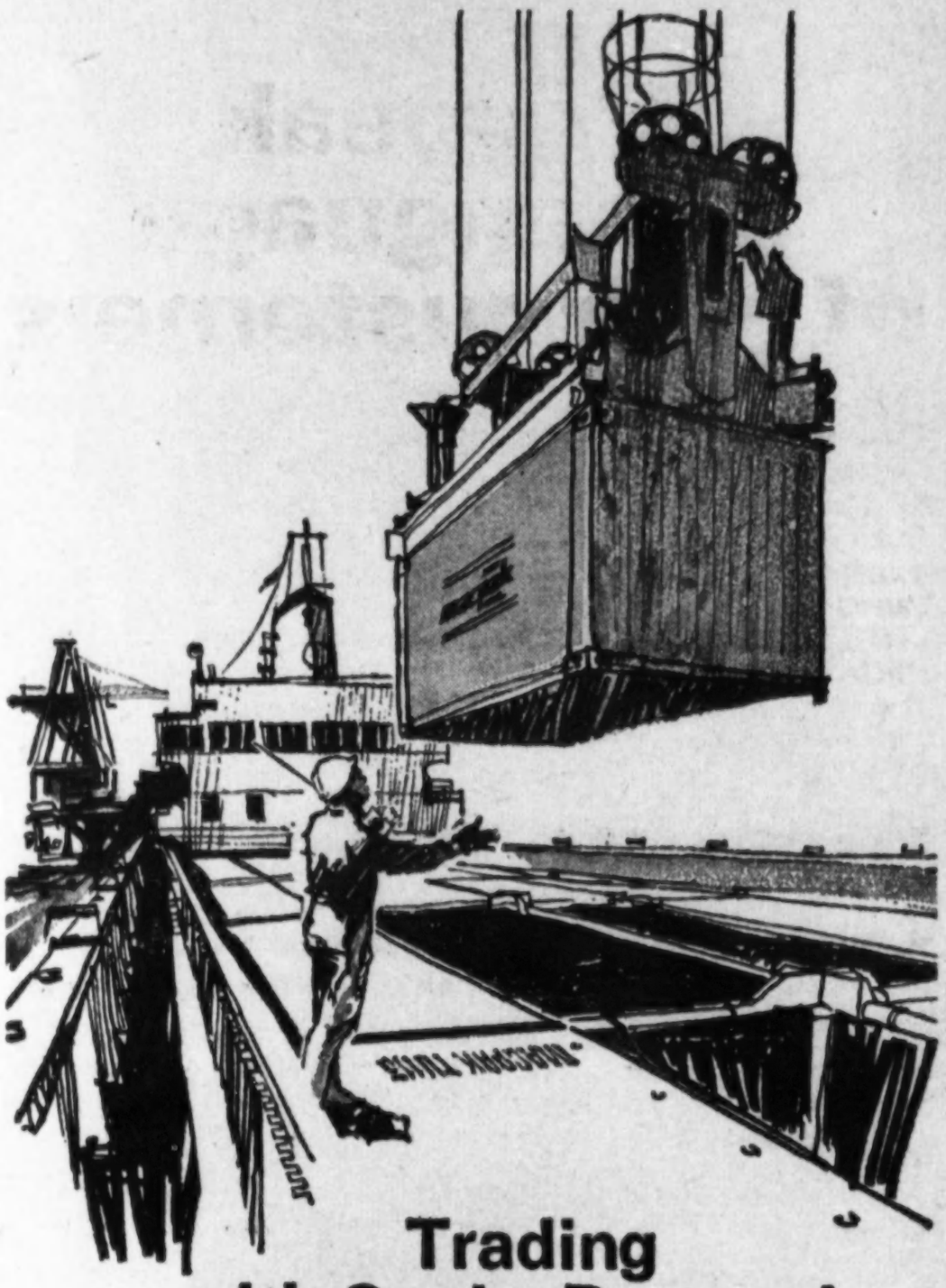

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Seventy thousand Babcock B 300 day-old chicks left Manston aerodrome, Kent, recently en route for the Lebanon, forming the largest single export order yet signed by Babcock Farms Ltd., Chelmsford. The chicks were hatched for Babcock by Zeals Hatcheries, the company's distributors in the West Country, Wales and West Midlands. The same week a second order of 8,000 Babcock B 300s – hatched by Blacknest Hatcheries, Babcock Southern distributors – left Southend Airport for Belgium. Further orders of Babcock birds will include breeders to Portugal and Cyprus and substantial quantities of commercial day-olds to Uganda, Nigeria, Iraq and Austria.

MALAGASY REPUBLIC

Global quotas

THE *Board of Trade Journal* of April 15, 1970 (p. 1053) published details of the Malagasy Republic's global import quotas for the six months commencing April 1, 1970.

It has now been announced that a quota of 436,000 French francs has been made available for the second half of 1970 for the import of used sacks of jute or other material.

Inquiries about this notice should be made to Tariff Section, Export Data Branch, Board of Trade, Room E59, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 248 5757, Ext. 288, 408, 423).

ZAMBIA

Suspension of duties

THE ZAMBIA Customs and Excise (Suspension) (Amendment) (No. 6) Regulations, 1970, amend, with effect from May 29, the Schedule to the Customs and Excise (Suspension) Regulations, 1970 (published in the *Board of Trade Journal* of February 25, page 560) by the deletion of the following items:

Heading No.	Description of goods	Effective Rate of duty
73.38.11	Basins, bowls, plates and saucers	30%
73.38.12	Mugs and cups	30%
74.18.10	Basins, bowls, plates and saucers	30%
74.18.20	Mugs and cups	30%
76.15.41	Basins, bowls, plates and saucers	30%
76.15.42	Mugs and cups	30%

Note:

The effect of this amendment is to bring the rate of duty on items 73.38.11, 74.18.10 and 76.15.41 to 30 per cent or KO.10 each whichever is the greater, and on items 73.38.12, 74.18.20 and 76.15.42 to 30 per cent or KO.07 each whichever is the greater.

Any inquiries relating to this notice should be addressed to the Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 471/2/3).

SUDAN

Nationalization of companies

THE NATIONALIZATION of the following companies was announced by President Nimeri of the Sudan on June 14:

Blue Nile Packing Co. Ltd., Blue Nile Brewery Ltd., Bata (Sudan) Ltd., Seferian and Co. Ltd., National Cash Register Co. (Sudan) Ltd., Red Sea Shipping Co., Sudanese Storing and Shipping, Automobiles Co. Ltd., Kattan Trading Co., Aybee Distillery Co. Ltd.

Cotton marketing and film distribution are also nationalized. A corporation will be set up for the importation and distribution of films in the Sudan.

Inquiries about this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2357).

Nationalizations of cotton exporting companies

ALL cotton exporting companies in the Sudan have been nationalized, and will be controlled by a Cotton Marketing Corporation. Four companies have retained their original names and will report direct to the Cotton Marketing Corporation, but in each case they have been expanded to incorporate other companies as follows:

Port Sudan Cotton and Trading Company, now also incorporating Alexandria Cotton and the White Nile Company;

Sudan Cotton Company Ltd. now also incorporating Hohman (Sudan) Company, Contomichalos (Cotton) Ltd. and El Nilein United Company;

Cotton Trading Company, now also incorporating Caterelo Cotton Company, Ling Company, the Delta and Agencies Company and the Nile Company;

The National Cotton Company, now also incorporating Khartoum Cotton Company, Rayevans Company and the Agricultural Finance Company.

Inquiries about this notice should be addressed to Commercial Relations Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2357).

Nationalizations, sequestrations and confiscations

THE NEW directors of a number of the firms which have recently been nationalized, sequestrated or confiscated in the Sudan have published notices calling on debtors and creditors to submit claims with supporting documentary evidence within 30 days.

Inquiries about this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2357).

LEBANON

Strike affecting trade

IT IS REPORTED that all transit trade through Beirut to the Arab hinterland (in both directions) came to a standstill on June 9, 1970, as the result of a strike of international transit firms called by the Lebanese Employers Union in response to recent measures by the Syrian Government to divert transit traffic to Syrian transport firms.

The Syrian authorities require 50 per cent of each way traffic between Beirut and Iraq to be carried in Syrian trucks and the Beirut/Iraq transit charges have been increased to 9 dinars a ton. Lebanese imports are not affected by the strike and unloading at the port of Beirut is proceeding normally.

Inquiries about this notice should be addressed to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 420 and 475).

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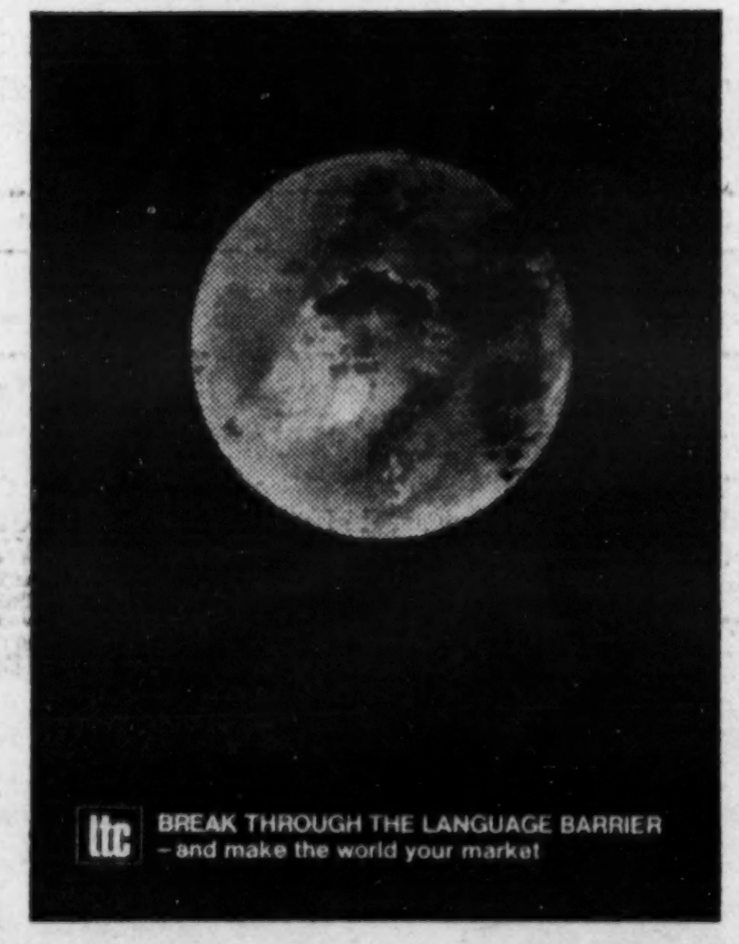

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MALAYSIA

Import control

THE MALAYSIAN Government Gazette dated May 14, 1970, published the following amendments to the Second Schedule of the Customs (Prohibition of Imports) (Temporary Protective Measure) Order, 1969.

(i) Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) (No. 3) Order, 1970 amends the Schedule by the deletion of the following:

Heading No.	Description of goods	Country
84.12	Air conditioning machines, self-contained, comprising a motor driven fan and elements for changing the temperature and humidity of air:	
910	of ¼ h.p. or less	All countries
920	of ½ h.p.	All countries
930	of 1 h.p.	All countries
940	over 1 h.p., but not over 2 h.p.	All countries
950	over 2 h.p. but not over 10 h.p.	All countries
960	over 10 h.p.	All countries

This amendment means that the goods are no longer subject to special licensing when imported into the States of Malaya from any country.

(ii) Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) (No. 4) Order, 1970 amends the Schedule by the addition of the following:

Heading No.	Description of goods	Country
11.02.401	Rolled oats in tins or packages ready for retail sale	All countries

This amendment means that the goods shown are now subject to special licensing when imported into the States of Malaya from any country.

(iii) Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) (No. 5) Order, 1970 amends the Schedule by substituting for 38.11.320 'Dalapon' the following:

Heading No.	Description of goods	Country
38.11.310	Weedkillers and anti-sprouting products, liquid	All countries
38.11.320	Weedkillers and anti-sprouting products, other than liquid	All countries

This amendment means that the goods shown are now subject to special licensing when imported into the States of Malaya from any country.

(iv) Customs (Prohibition of Imports) Temporary Protective Measure) (Amendment) (No. 6) Order, 1970 amends the schedule by the addition of the following:

Heading No.	Description of goods	Country
39.02.390	Imitation leather of polyvinylchloride in sheets	All countries
59.08.000	Textile fabrics impregnated or coated with preparations of cellulose derivatives or of other artificial plastic materials	All countries

This amendment means that the goods shown are now subject to special licensing when imported into the States of Malaya from any country.

(v) Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) (No. 7) Order, 1970 amends the schedule by the deletion of the following:

Heading No.	Description of goods	Country
39.01.510 39.01.590 39.02.120 39.02.230 39.02.340 39.02.430 39.02.520 39.02.620 39.02.920 39.03.310 39.03.390	Laminated plastic sheets	All countries

This amendment means that the goods shown are no longer subject to special licensing when imported into the States of Malaya from any country.

Inquiries regarding this notice should be made to Tariff Section, Export Data Branch, Board of Trade, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 468 and 469).

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JAPAN

Import deposits

THE JAPANESE GOVERNMENT announced recently that their import deposit scheme would be abolished with effect from May 18, 1970. The rate on all imports had previously stood at 1 per cent.

Inquiries about this notice should be addressed to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 475 or 420).

AUSTRALIA

Result of Special Advisory Authority Inquiry on artificial Christmas trees

A NOTICE was published in the *Board of Trade Journal* on May 20, 1970, to the effect that a reference had been made to the Australian Special Advisory Authority in respect of artificial Christmas trees (tariff items 67.02 and 97.05).

The Inquiry has now been held, and as a result of the Special Advisory Authority's recommendations, artificial Christmas trees will now be classified under 97.05.400 at duties of 7½ per cent General and Free Preferential, with temporary duties of 37½ per cent General and 35 per cent Preferential.

The temporary duties will not apply to goods in direct transit to Australia on May 7, 1970, provided they are entered for home consumption on arrival.

Inquiries about this notice should be addressed to the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2318), quoting reference No. CRE 511/70.

Result of Tariff Board inquiry: alginic acid (plastic products)

NOTICES WERE PUBLISHED in the *Board of Trade Journal* of December 9, 1966 (page 1477), and December 23, 1966 (page 1596), to the effect that a reference had been made to the Australian Tariff Board in respect of plastic products.

(*Continued on page* 1688)

INTERNATIONAL TRADE CENTRE

The International Trade Centre UNCTAD/GATT, which helps developing countries in the field of export promotion, was set up in May 1964, by the Contracting Parties to the General Agreement on Tariffs and Trade (GATT), who now operate it jointly with the member States of the United Nations Conference on Trade and Development (UNCTAD). The four main spheres of operations are those of training in export promotion; the carrying out of market surveys in developed countries; a trade promotion advisory service; and a publications programme. The Centre's services are made available free of charge of all developing countries.

For further information write or phone the United Kingdom Liaison Officer: Miss E. P. M. Baggs, Board of Trade, 1 Victoria Street, S.W.1 (Tel, 01-222 7877, Ext. 2438).

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AUSTRALIA, *continued*

The Inquiry has now been completed on alginic acid and its derivatives (tariff item 39.06.3), and as a result the following tariff changes have been made, effective from June 12, 1970: 37½ per cent General and 30 per cent Preferential.

By-law admission is to be extended to propylene glycol esters of alginic acid and sodium alginate for textile screen printing.

Full details of these changes will be published in the *Board of Trade Journal* as soon as possible.

Inquiries about this notice should be addressed to the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2319), quoting reference No. CRE 1027/70.

NEW ZEALAND

Emergency Protection Authority inquiry into marine outboard engines

THE NEW ZEALAND Minister of Industries and Commerce has referred to the Emergency Protection Authority for inquiry and report the question whether it is necessary that protective action, by means of temporary additional duties or temporary restriction of importation (or by a combination of both) be taken in respect of Marine Outboard Engines up to and including 7 h.p.

Details of the tariff items, under which the above-mentioned goods are dutiable, are given below.

Tariff Item	Unit	British Preferential	Most Favoured Nation	General
Ex 84.06.22 pt	No.	Free	20%	25%

The Emergency Protection Authority is required to report to the Minister by July 11, 1970.

In the short time available for investigation United Kingdom interests wishing to make their views known to the Emergency Protection Authority will no doubt get in touch with their Agents or the Director of the British Trade Association of New Zealand Inc., PO Box 2286, Wellington, New Zealand, telegraphic address 'Transtrade' (Tel.: Wellington 43-706). The BTANZ charges a fee for its services, the amount varying according to the work entailed and whether the trade association or firm is a member. Details may be obtained from the BTANZ.

Any British trade association or firm requiring further details or proposing to submit evidence is asked to advise the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2321), quoting reference CRE 816/69.

Emergency Protection Authority inquiry into letter clips and paper clips

THE NEW ZEALAND Minister of Industries and Commerce has referred to the Emergency Protection Authority for inquiry and report the question whether it is necessary that protective action, by means of temporary additional duties or temporary restriction of importation (or by a combination of both) be taken in respect of letter clips and paper clips of base metal of Bulldog and Slide type respectively.

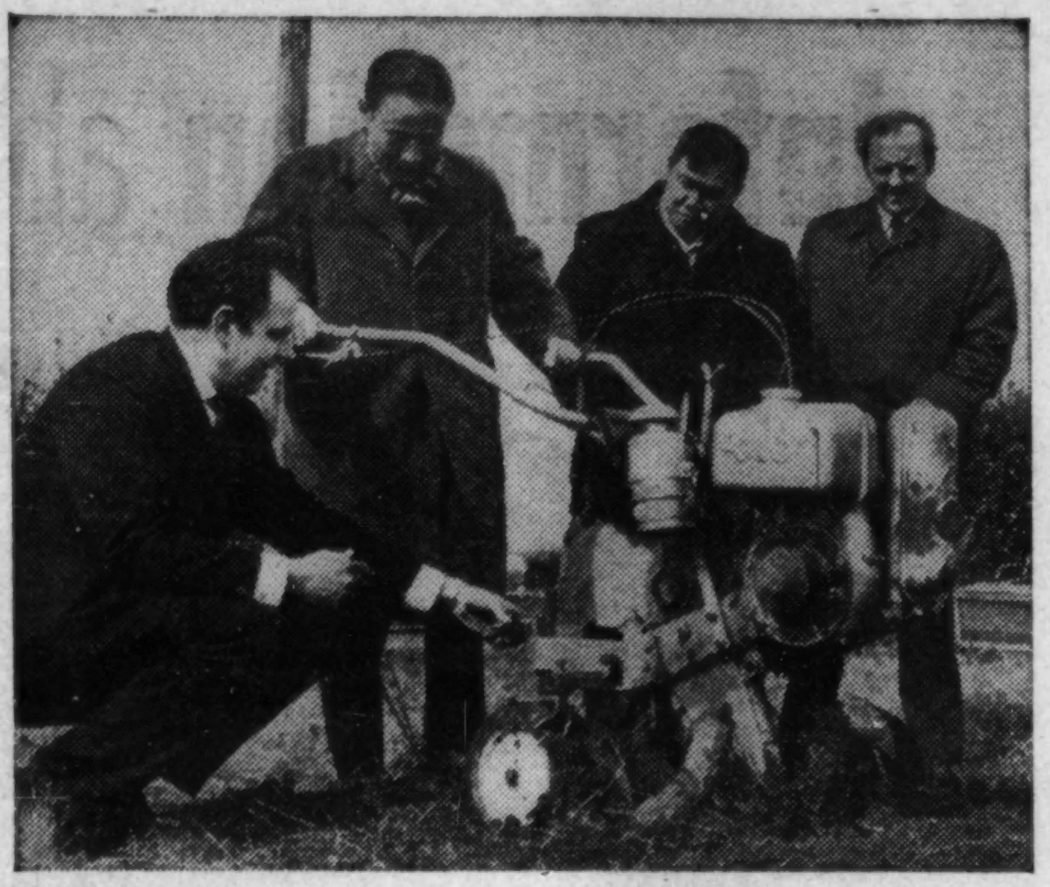
Details of the tariff items, under which the above mentioned goods are dutiable, are given below.

Tariff Item	Unit	British Preferential	Most Favoured Nation	General
83.05.09	Cwt.	20% Can. 30%	50%	60%

The Emergency Protection Authority is required to report to the Minister by July 13, 1970.

In the short time available for investigation United Kingdom interests wishing to make their views known to the Emergency Protection Authority will no doubt get in touch with their Agents or the Director of the British Trade Association of New Zealand Inc., PO Box 2286, Wellington, New Zealand, telegraphic address 'Transtrade' (Tel. Wellington 43-706). The BTANZ charges a fee for its services, the amount varying according to the work entailed and whether the trade association or firm is a member. Details may be obtained from the BTANZ.

Any British trade association or firm requiring further details or proposing to submit evidence is asked to advise the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2321), quoting reference CRE 830/69.



Two agricultural engineering experts from Saigon recently paid a fact-finding visit to this country, in connection with the Republic of Vietnam's 'Land to the Tiller' programme. They are seen here visiting Landmaster Ltd. of Hucknall. Seen here are (left to right): Mr. E. C. Marshall, technical manager, Landmaster, pointing out a design feature of their 150 cultivator to Mr. Truong Dinh Huan and Mr. Luu Van Le, watched by Mr. M. Sharples, Landmaster's export manager.

Customs tariff inquiry into salt

THE NEW ZEALAND Minister of Customs has amended the terms of reference on the above inquiry which will now be confined to salt iodized (Tariff Item Ex 25.01.02) and salt, not iodized (Tariff Item Ex 25.01.03) both items packed for retail sale.

Details of this inquiry were published in the *Board of Trade Journal*, June 10, 1970, page 1584.

Inquiries about this notice should be addressed to the Commercial Relations and Exports Department. Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2321), quoting Ref. CRE 975/70.

GUYANA

Import licensing arrangements

THE GUYANA TRADE (Control of Import and Export) (No. 3) Order, 1970, requires importers and agents to obtain a licence before importing ice cream cones (Item No. 048-04.3) and electric accumulators (Item No. 721-19.1).

Prohibition of trade with Portugal

THE GUYANA TRADE (Portugal) (Prohibition) (Amendment) Order, 1970, adds to the original order, details of which were published in the *Board of Trade Journal* of May 20 (page 1433), a clause stipulating that every reference to Portugal includes all territories under Portugese administration.

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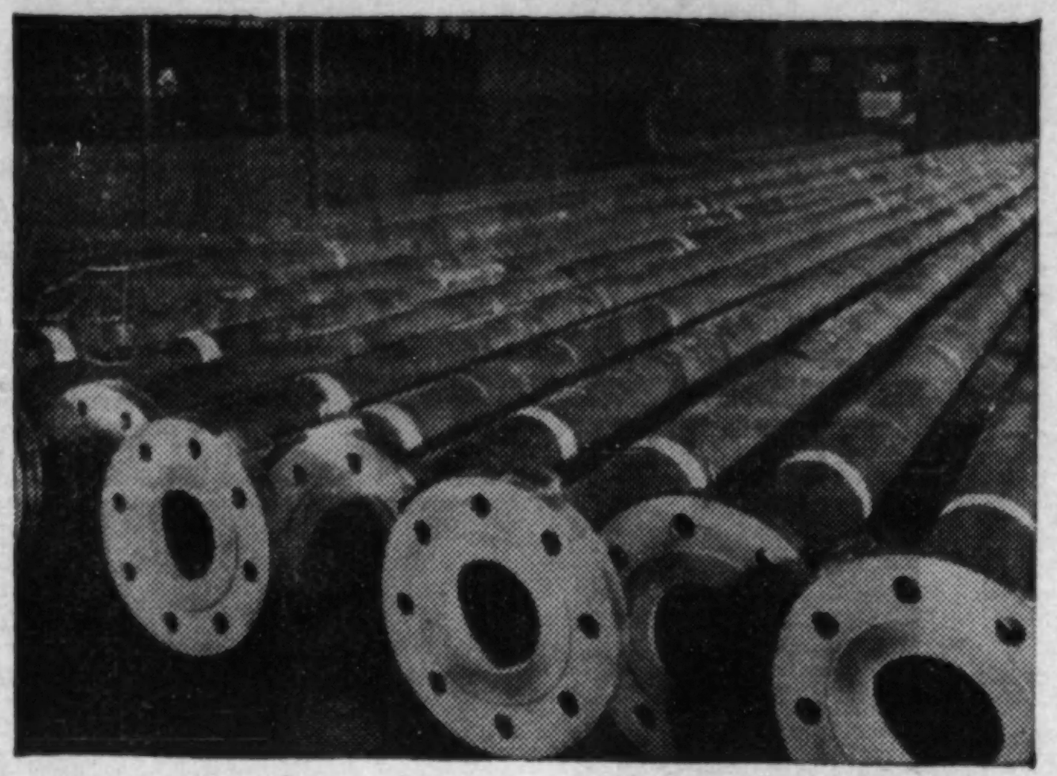
CANADA

Changes in customs tariff

THE CANADIAN GOVERNMENT have issued Order in Council PC 1970-957 dated June 2, 1970 making the following changes in the Canadian customs tariff:

Tariff Item		British Preferential Tariff	Most Favoured-Nation Tariff	General Tariff
37310-1	Tinplate scrap, imported for recovery of the tin coating and remelting of the ferrous metal in furnaces or cupolas (Expires October 31, 1971)	Free	Free	Free
42730-1	Steel cages for use in the manufacture of tapered roller bearings (Expires October 31, 1971)	Free	Free	35%
44552-1	Metal inserts for use in the manufacture of powdered iron or ferrite cores and other shapes (Expires October 31, 1971)	Free	Free	25%
48210-1	Articles for use in the manufacture of hearing aids (Expires October 31, 1971)	Free	Free	Free
56117-1	Yarns, wholly of glass filaments, whether or not plied, for use in the manufacture of woven tyre fabrics and per pound (Expires January 31, 1971)	17½%	5% 10 cts.	35% 20 cts.
56135-1	Yarns, wholly of viscose or cuprammonium rayon filaments, for use in the manufacture of velvets and per pound (Expires January 31, 1971)	Free	Free	35% 20 cts.
56140-1	Yarns, wholly of viscose rayon filaments for use in the manufacture of mattress tickings and per pound (Expires October 31, 1970)	Free	Free	35% 20 cts.
56237-1	Woven tyre fabrics, wholly of glass filament yarns, whether or not coated or impregnated, for use in the manufacture of pneumatic rubber tyes and per pound (Expires January 31, 1971)	15%	17½%	45% 40 cts.
404-4	Diamides of ethylenediamine and fatty acids described in heading 91510 for use in the manufacture of moulded articles of wood pulp composition (Expires January 31, 1971)	Free	Free	25%
93				
819-15	Dimerized fatty acids for use in the manfacture of non-fibre type polyamide resins (Expires January 31, 1971)	Free	Free	25%
93901	Condensation, polycondensation and polyaddition products, whether or not modified or polymerized, and whether or not linear (for example, phenoplasts, aminoplasts, alkyds, polyallyl esters and other unsaturated polyesters, silicones):			
	(c) Moulding compositions, n.o.p. including scrap or waste, whether or not completely formulated; such compositions in the form of not fully cured preforms for compression mouldings:			
93901-45	Melamine formaldehyde preforms for use in Canadian manufactures (Expires January 31, 1971)	Free	Free	25%
93901-46	Epoxy moulding compositions, in dry form, for use in the encapsulation of electrical components (Expires January 31, 1971)	Free	Free	25%

Firms requiring any further information should contact Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 455, 456 and 457), quoting reference PC 1970-957.



Part of a consignment of reformer tube assemblies produced in centrifugally cast 25 per cent chromium, 20 per cent nickel alloy steel at the Tees side Division of APV-Paramount Ltd. The assemblies are for export to India for installation in an ammonia plant.

Hazardous Products Act

COPIES OF the Hazardous Products Act which came into force in Canada on May 1, 1970, are now available from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 455, 456 and 457).

UNITED STATES

Control of electronic product radiation

THE *Board of Trade Journal* of January 7, gave notice of proposed regulations of the United States Department of Health, Education and Welfare specifying the reports and records that manufacturers of certain electronic products are required to keep under the provisions of the United States Radiation Contol for the Health and Safety Act of 1968.

The Department of Health, Education and Welfare has now adopted the regulations with certain minor revisions. The regulations become effective on June 28, 1970.

Further information may be obtained from Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 455, 456, 457). reference FR 28.5.70.

Flammable Fabrics Act: blankets and mattressses

THE UNITED STATES Federal Trade Commission has announced proceedings for the development of Flammability Standards or other regulations, including labelling for blankets and mattresses. Interested persons are invited to submit their views on the need for such standards and on the form they should take. Four copies of comments should be submitted to the Department of Commerce not later than July 10, 1970.

Further details may be obtained from the Commercial Relations

REPORTS FOR UNITED KINGDOM EXPORTERS ON OVERSEAS REPRESENTATIVES

INFORMATION ABOUT the commercial standing of overseas representatives is available to you through the Board of Trade and is particularly useful in indicating whether a firm is suitable to act as your agent. Many status reports are on record, and where these need to be brought up to date or new reports obtained, this is rapidly done in collaboration with Diplomatic Service commercial officers abroad.

These reports can tell you of the local standing of overseas representatives, the scope of their activities, and the size of their organization, and their suitability to act as your agent. The reports do not, however, include credit ratings or detailed financial information, and reports on potential customers should be obtained from specialized sources such as banks or credit reporting agencies. Requests for reports should be addressed to Export Services Division, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, or to the appropriate Regional Office of the Board.

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Replies to Box Numbers should be addressed to **Box No.—Board of Trade Journal, Room D92, Atlantic House, Holborn Viaduct, London, E.C.1.**

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UNITED STATES, *continued*

and Exports Department, United States Section, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2397), Ref. FR 10.6.70 (1) and (2).

Mandatory safety standards for underground coal mines

THE UNITED STATES Department of the Interior-Bureau of Mines has published details of its proposals to amend Section 305 (a) (1) of the Federal Coal Mine Health and Safety Act of 1969.

This amendment will permit the use of all electrical equipment (except low horse-power rock dusting equipment), which employs an electric current and consumes not more than 2,250 watts of electricity, inby the last open crosscut of any mine.

Interested persons are asked to make representation to the Bureau of Mines before July 2, 1970. Further details may be obtained from the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2404), quoting reference FR3.6.70.

Minimum federal safety standards for gas pipeline—corrosion control

THE *Board of Trade Journal* of May 27 gave notice of proposals put forward by the United States Department of Transportation for minimum standards for the protection of gas pipeline and gas pipeline facilities from external and internal corrosion.

There has now been a new notice which makes certain changes in the previous proposals relating to cast iron and ductile iron pipe.

Further details may be obtained from Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2404). Ref. FR 6.6.70.

Classification of certain hazardous materials concerning health hazards

THE UNITED STATES Hazardous Material Regulations Board is planning to consider, in the near future, a proposal for classification tests for poisonous materials on the basis of their hazard to health.

The publication of these proposals result from a notice issued by the Hazardous Materials Regulations Board in August 1968, which was (as is this notice) not proposed legislation, but an effort to get early public participation in the rule making.

The proposals put forward that the hazardous materials will be classified by their acute effects on human health under the headings 'systemic', 'contact' and 'irritant' hazards. Interested persons are asked to give their views as to whether they consider this approach to the regulations is a reasonable and practicable one to the Hazardous Materials Regulations Board before September 4, 1970.

Further details may be obtained from the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2404). Ref. FR 6.6.70.

(Continued on next page)

WORK OF BRITISH STANDARDS INSTITUTION

The British Standards Institution (British Standards House, 2 Park Street, London, W.1) is well known as the official standards organization for this country. It also takes an active part in the work of international standards organizations such as ISO and IEC. Apart from standards work, BSI has several other functions. It runs a certification mark scheme, granting licences to manufacturers to use the BSI 'Kite mark' on products conforming to British Standards. It also undertakes testing work for outside bodies. It runs a Technical Help to Exporters scheme, providing firms selling abroad with information on overseas technical regulations applying to their products. It has been designated as the focal point for the British change to the metric system, which means that it co-ordinates the details and timing of the change in each industry, apart from re-writing thousands of British Standards in metric form.

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UNITED STATES, *continued*

Fair Packaging and Labelling Act: Christmas tree ornaments

THE *Board of Trade Journal* of April 15, 1970 gave notice of a proposal by the United States Federal Trade Commission to exempt Christmas tree ornaments packaged and labelled for retail sale from certain of the labelling requirements issued under the United States Fair Packaging and Labelling Act.

The proposed exemption has now been adopted.

Inquiries about this notice should be addressed to Tariff Section, Export Data Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. 01-248 5757, Ext. 455, 456, 457), ref. FR 12.6.70.

Motor vehicle safety regulations

THE *Board of Trade Journal* of October 18, 1968, gave notice of a proposed consumer information requirement in the United States on illumination and glare produced by head lamps. The National Highway Safety Bureau has now proposed a new information requirement that manufacturers of motor vehicles of less than 10,000 pounds GVW should provide concerning the effect of vehicle loading on head lamp aim.

Interested persons are invited to submit written comments on this proposal with the National Highway Safety Bureau by September 3, 1970.

Further details about this notice may be obtained from the Commercial Relations and Exports Department, United States Section, Board of Trade, 1 Victoria Street, London, S.W.1 (Tel. 01-222 7877, Ext. 2397).

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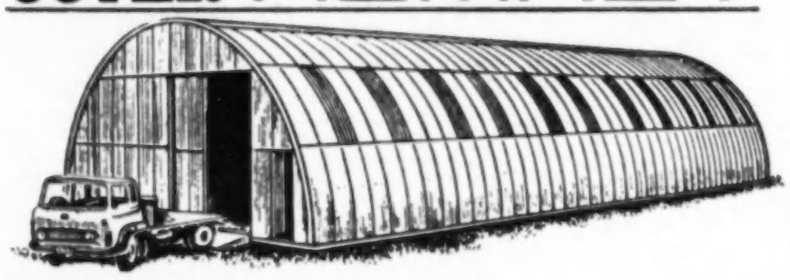

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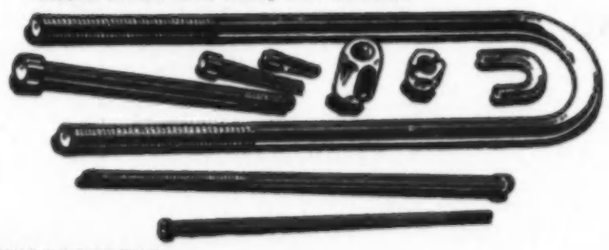

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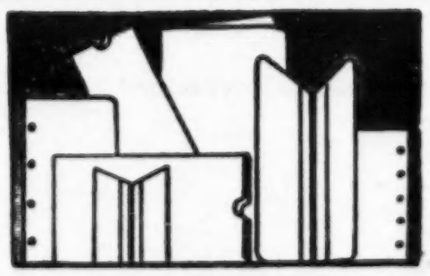

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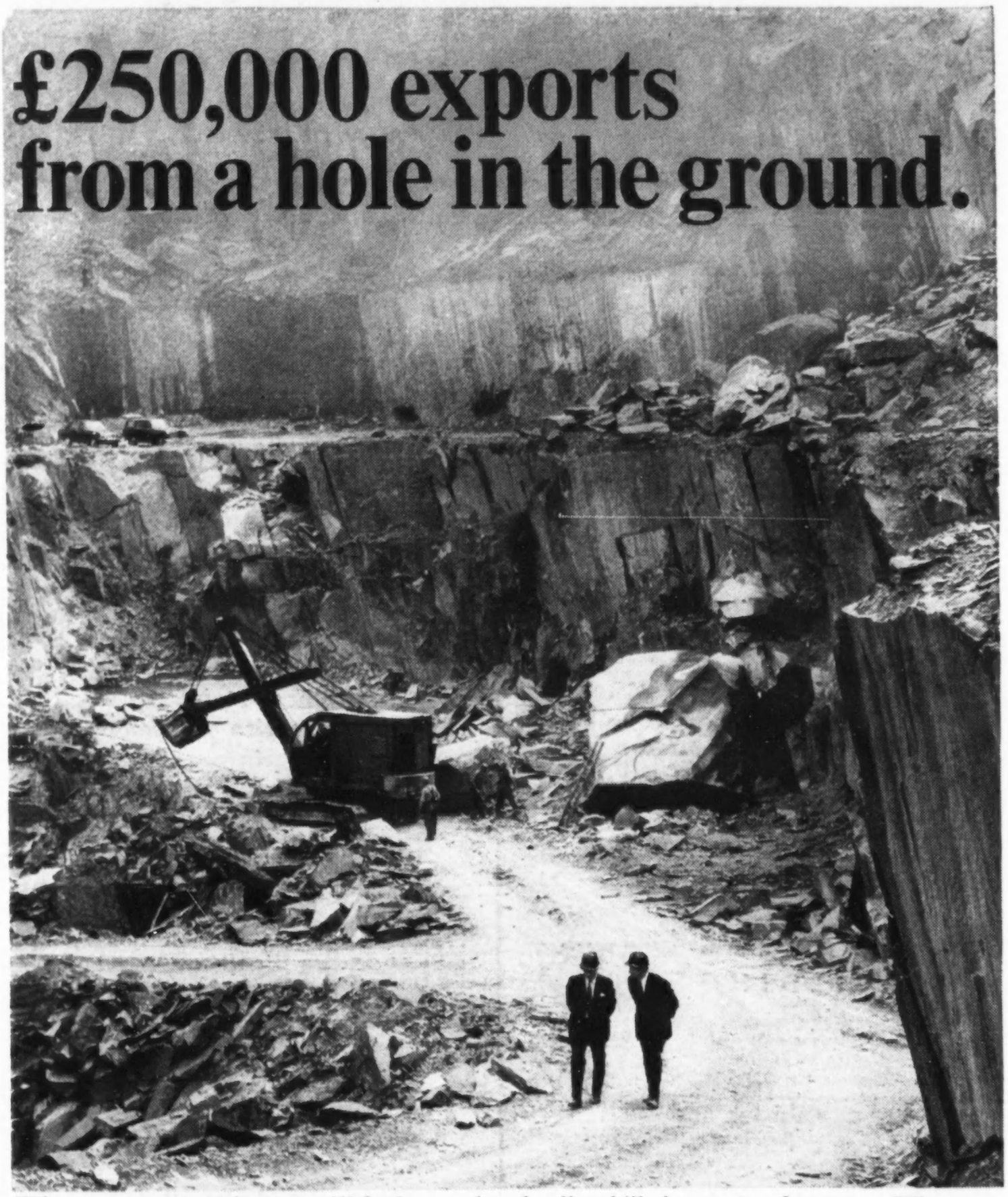

Whatever your product, you'll find growth markets overseas. This is the view of managing director David W, whose marketing company has revived a pre-1914 tradition of large-scale slate exporting. We talked to him at a slate quarry in Furness.

Interviewer: What are the outlets for slate these days?

David W: Mostly roofing and flooring, and facing for churches, office blocks, underpasses, any kind of largish construction. Insulating switchboards is another application, and many new ones are on the way. We think slate granules have an interesting future on roofing felts. Almost all our export slate is going for building.

Slate is expensive to ship. Was this why the export trade died?

David W: The very high labour content for loading killed exports after 1914. When we began looking at exporting again in 1965, we designed a special collapsible loading box. That, combined with new methods of mechanical loading, put the thing back on a viable basis.

What made you re-start exporting in 1965?

David W: The economic doldrums at home, and a shortage of slate in France.

You started there, but now you've expanded into other markets?

David W: We're also selling in Denmark, Holland, Germany, Iceland — and now U.S.A., which has very big potential. We were up to £250,000 overseas last year, and we think we can double that in time.

How do you develop a new market?

David W: We get help from the British Embassies and we appoint an agent.

Has your ECGD cover helped you expand?

David W: We very soon found we needed this. Each cargo we ship is worth around £20,000 and we often have two cargoes outstanding. If a customer defaulted we'd be in bad trouble. We also plan to use the ECGD comprehensive bank guarantee so that we can raise bank finance for exports at Bank Rate. It's expensive building up export markets. We're very glad of this help through ECGD.

Are you optimistic about the future?

David W: In this trade you take the long view. The first shipment of slate from this quarry was in 1688. Its peak production year was 1863. With a lot of effort, we might begin to approach that size of output again in the nineteen-seventies.

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